

# The CACFP Information and Payment System (CIPS)



## Center Sponsor User Manual



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# Welcome To CIPS!

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Congratulations! By using CACFP's online system, hundreds of Sponsors are decreasing paperwork and turnaround time for many CACFP related tasks.

This manual has been created to help Sponsors with the functions they can expect to use while managing their CACFP needs online. Most are written step by step and include images of the actual screens that are seen when using CIPS.

Before using CIPS, please read the sections titled "Login through NYSDOH Health Commerce System (HCS)" and "CIPS Navigation". These sections will help with accessing CIPS and avoiding common navigation mistakes.

It is important to know that CIPS stores information by CACFP Program Year, which begins on October 1 and ends on September 30. This is the Federal Fiscal Year. If a sponsor wants to see their claims from a previous fiscal year, they would need to open that year for viewing. Learn more about changing the Program Year in the section called "CIPS Navigation".



# System Requirements for CIPS Access

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The CACFP Information and Payment System (CIPS) is a web based application that allows users to access the application on any computer that is supported by an internet connection. For optimal functioning of the CIPS application, certain internet browsers and versions of the browsers are recommended. The list below indicates the fully and partially supported browsers for the various forms of technology (desktop and mobile devices) that are frequently used to access the internet. Please check your web browser to ensure you are using a supported browser to access all components of CIPS.

## **Fully Supported:**

### **Desktop:**

- Microsoft Internet Explorer
- Google Chrome
- Safari (Mac OS only)

### **Mobile:**

- Safari (iOS5.1 or later)
- Google Chrome (iOS5.1/Android 4.0 or later)

## **Limited Support:**

- Mozilla Firefox (Desktop and mobile)
- Most Webkit-based browsers (Android OS 2.3 or later)

## **Unsupported Browsers:**

- Microsoft Internet Explorer Mobile (Windows 8 Phone)
- Safari for Windows (Desktop)

Further information can be found at the following link:

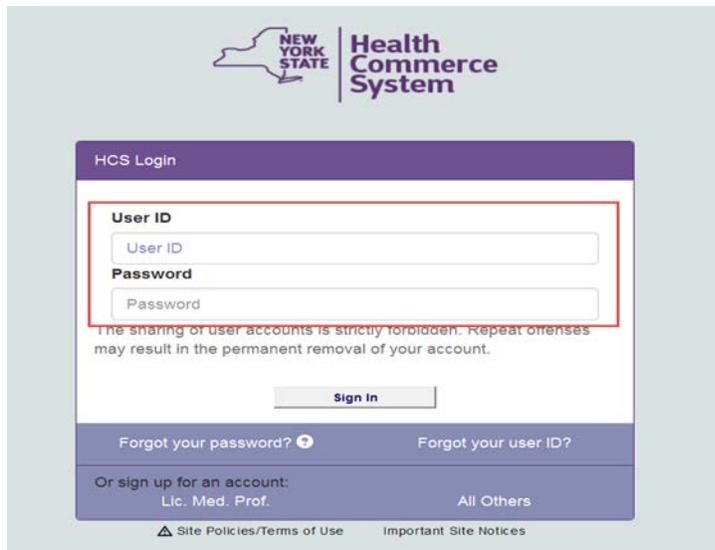
<https://commerce.health.state.ny.us/hcs/help/help.html>

## Login through the NYSDOH Health Commerce System (HCS)

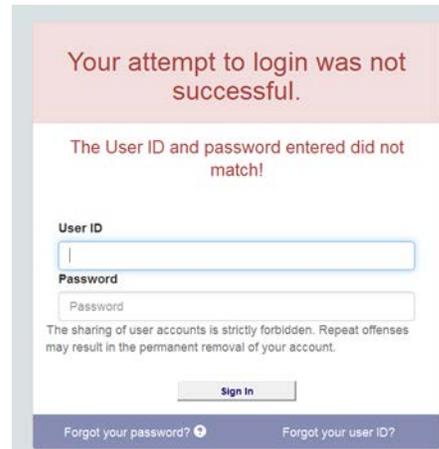
The NYSDOH Health Commerce System (HCS) is where users login to get access to CIPS. Authorized users have gone through an application process and will have an assigned User ID and password.

### How to Login to HCS

1. Go to the HCS Login Portal at: <https://commerce.health.state.ny.us>
2. Users will enter their own HCS assigned User ID and password.
3. Click **Sign In**



The screenshot shows the HCS Login page. At the top, there is the New York State logo and the text "Health Commerce System". Below this is a purple header with "HCS Login". The main content area has a white background with a red border around the login fields. There are two input fields: "User ID" and "Password". Below the fields is a warning message: "The sharing of user accounts is strictly forbidden. Repeat offenses may result in the permanent removal of your account." Below the warning is a "Sign In" button. At the bottom of the form, there are links for "Forgot your password?" and "Forgot your user ID?". Below the form, there is a section for "Or sign up for an account:" with options for "Lic. Med. Prof." and "All Others". At the very bottom, there are links for "Site Policies/Terms of Use" and "Important Site Notices".



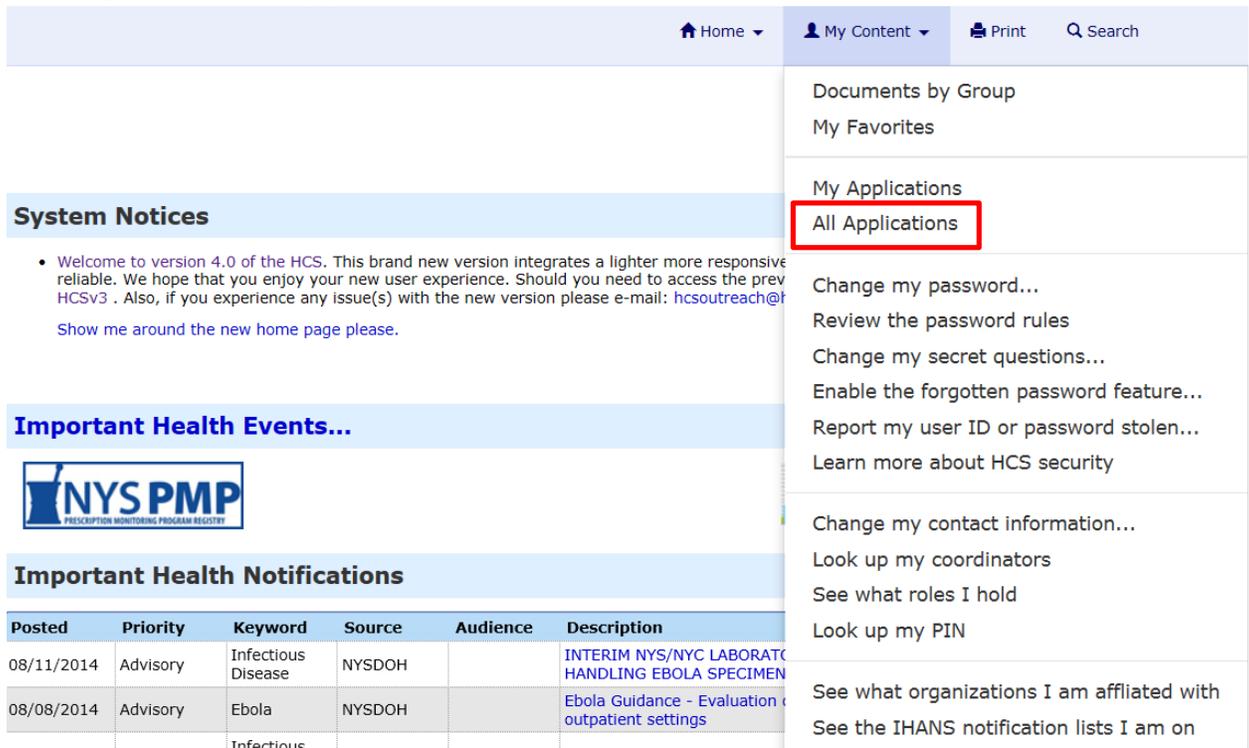
The screenshot shows an error message on the HCS login page. The message is in a pink box at the top: "Your attempt to login was not successful." Below this, the text reads: "The User ID and password entered did not match!". There are two input fields: "User ID" and "Password". Below the fields is the same warning message: "The sharing of user accounts is strictly forbidden. Repeat offenses may result in the permanent removal of your account." Below the warning is a "Sign In" button. At the bottom of the form, there are links for "Forgot your password?" and "Forgot your user ID?".

**NOTE:** This message will appear if the wrong user ID or password is entered.

**If you have trouble logging into HCS, contact the Commerce Account Management Unit (CAMU) directly at: 1-866-529-1890.**

## How to find CIPS:

1. Click **My Content- All Applications**



Home | My Content | Print | Search

Documents by Group  
My Favorites

My Applications  
**All Applications**

Change my password...  
Review the password rules  
Change my secret questions...  
Enable the forgotten password feature...  
Report my user ID or password stolen...  
Learn more about HCS security

Change my contact information...  
Look up my coordinators  
See what roles I hold  
Look up my PIN

See what organizations I am affiliated with  
See the IHANS notification lists I am on

**System Notices**

- Welcome to version 4.0 of the HCS. This brand new version integrates a lighter more responsive reliable. We hope that you enjoy your new user experience. Should you need to access the prev HCSv3 . Also, if you experience any issue(s) with the new version please e-mail: [hcsoutreach@...](mailto:hcsoutreach@...)  
[Show me around the new home page please.](#)

**Important Health Events...**



**Important Health Notifications**

Posted	Priority	Keyword	Source	Audience	Description
08/11/2014	Advisory	Infectious Disease	NYSDOH		INTERIM NYS/NYC LABORATORY HANDLING EBOLA SPECIMEN
08/08/2014	Advisory	Ebola	NYSDOH		Ebola Guidance - Evaluation of outpatient settings
		Infectious			

2. Click **C**

This will open a list of applications beginning with the letter C.

3. Find **CACFP Information and Payment System**

Browse by **A B C D E F G H I J K L M N O P Q R S T U V W X Y Z** [View All](#)

Application Name	Acronym	Profile	Restricted	Add/Remove
CACFP Information and Payment System	CACFP			

My Applications

- Acronyms & Abbreviations
- CACFP CIPS**
- CART
- Emergency Contacts
- ServNY
- Refresh My Applications List**

4. Click on **CACFP CIPS**

This will send users to the CIPS Welcome page.

Click here to add CIPS to "My Applications" for easier access.

This is the CIPS Welcome page. Sometimes CACFP will post important messages here that might require Sponsor action. Always check to see if there are any messages or notices.



5. Click **Continue** to enter CIPS.

# CIPS Navigation

---

Once a user is in CIPS, it is important they know how to navigate, or get around, the site. Common browser buttons do not work in CIPS. When used, information may not be saved properly.

## CIPS Menu Bar

The **DARK BLUE** CIPS Menu Bar is one way users can select areas in CIPS to do tasks like updating sponsor or center information, submitting claims and responding to program review findings. There are four different areas within CIPS where work can be done. These include:

- Applications
- Claims
- Reviews
- Security

## Program Year

As mentioned earlier, information is stored by program year, which runs from October 1 through September 30. Always check to see what program year is open before making changes or submitting claims. The program year is found in the **GREEN** bar under the CIPS Menu bar.



Find the Program  
Year currently  
open here.

Sometimes, a user will need to make a change to an application or enter a claim that is in the previous program year. Users can change the program year by clicking on **Year**, which will open a list of available years. Click the year needed to see claims, applications or board list for that time frame.



### Selecting a Program Year- TIPS

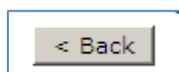
- Always check the Program Year before entering a claim/adjusted claim or making changes to a sponsor or center application.
- Change the program year when necessary. Choose the year in which the change took place. For example:
  - The **Effective Date** of a new or amended license/permit.
  - The **Expiration or Closed Date** of a license/permit to close a center.
  - The claim/adjusted claim Month.

### The “Bread Crumb” Trail, Moving Backwards and Between Tasks

A “bread crumb” trail is available in the **GREEN** bar under the CIPS Menu bar. Use it to return to previous screens.



The “**Back**” button at the **BOTTOM** of the screen can also be used to move backward in CIPS.



The CIPS Menu bar can be used to move between different screens in CIPS. For example, going from a center application to a claim or corrective action plan.



**IMPORTANT:**

Do not use the internet browser back arrow. The browser arrows/buttons do not work in the CIPS Application. This can cause problems, such as information not saving properly. An error screen may appear when using the browser arrows/buttons.



**Hovering and Other Actions**

Users can hover over screen buttons to see a description of where the button will take them.

Actions in **LIGHT BLUE** lettering can be clicked to move to another screen and view, revise or modify information:

Action	Form Name	Latest Version	Status
<a href="#">View   Modify</a>	✔ Sponsor Application	Rev. 3	Not Submitted
<a href="#">View</a>	✔ Financial Information		Approved
<a href="#">View</a>	✔ Non-Discrimination Policies		Approved
<a href="#">View   Revise</a>	✔ Board of Directors Board Member List	Original	Approved
<a href="#">View   Revise</a>	✔ Sponsor Budget	Original	Approved
Details	Checklist Summary		

	Approved	Pending	Return for Correction	Denied	Withdrawn/ Closed	Error	Total Applications
Center Application(s)	1	0	0	0	0	0	1

Next Base Year Renewal: 2015 - 2016

## Action Buttons in CIPS

**View-** View only, no changes are possible.

**Revise-** A new version of the Sponsor Application and Center Application will be created when a user clicks Revise. This action initiates a change.

**Modify-** Information can be changed. This option appears after a new version of an application has been started.

### Logging Out of CIPS and HCS

To logout of CIPS, the user will select **Logout** in the far right corner of the **DARK BLUE** CIPS Menu bar at the very top of the screen.



**Child and Adult Care Food Program**


**CACFP**  
 Child and Adult Care Food Program  
 New York State Department of Health

[Applications](#) | [Claims](#) | [Reviews](#) | [Reports](#) | [Security](#) | [Search](#) | [Year](#) | [Help](#) | [Log Out](#)

Applications > Program Year: 2012 - 2013

Item	Description
Sponsor Profile	CACFP Sponsor Profile Information
Application Packet - Center Sponsor	Center Sponsor Applications and Agreement Forms
Advance Requests	Request Sponsor's CACFP Advance(s) for the current year

# Chapter 1 – The Applications Menu

This chapter will focus on the Applications menu. By selecting **Applications** at the **DARK BLUE** CIPS Menu bar, a new menu will open. This is the Applications menu and includes the following items: the Sponsor Profile, Application Packet-Center Sponsor and Advance Requests.

**Reminder**

When working in CIPS, use the **DARK BLUE** CIPS Menu bar. Do not use the **LIGHT BLUE** HCS Menu.



## Sponsor Profile

The first item in the Applications menu is the Sponsor Profile. By clicking **Sponsor Profile**, the Sponsor Profile Menu will open. From this menu users can select the **Sponsor Profile** or **Center Manager**.



### 1. Sponsor Profile

The Sponsor Profile, seen on the next page, has two sections. They contain very general, but important information like the Federal Identification Number, the Financial Representative and Administrative Representative. Users cannot make any changes to this screen, but if something is incorrect, they should contact their Administrative Representative to fix it.

To view the Sponsor Profile:

1. From the **Applications Menu**, select **Sponsor Profile**.
2. Select **Sponsor Profile** (again) to view.
3. Select **<Back** when finished viewing.

## Child and Adult Care Food Program



Applications | Claims | Reviews | Reports | Security | Search
Year | Help | Log Out

Applications > Sponsor Manager >
Program Year: 2012 - 2013

[VIEW](#)

### Sponsor Profile

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**Sponsor Information**

Agreement Number:	7000
Sponsor Name:	Learning CIPS, Inc.
Payee Name:	Learning CIPS, Inc.
Federal Identification No. (FEIN):	999999999
Municipality Code:	
Region:	Capital District
Vendor ID:	9999999999
DUNS Number:	
County:	ALBANY
Sponsor is interest eligible?	<input type="radio"/> Yes <input checked="" type="radio"/> No

---

**Child & Adult Care Centers**

Participating in the Centers Program

Sponsor submits information:  Electronic  Paper

One-Time Only Used Date:

DCC Financial Representative: Jones, Cherry

DCC Administrative Representative: Locks, Goldie

Last Base Year Renewal: 2013

Next Base Year Renewal: 2016

Next Renewal Frequency (Years): 3

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**Day Care Home Program**

Information below this point is used for Day Care Home Sponsors. Users may disregard this section.

### Sponsor Profile- TIPS

Find important contact information in the Sponsor Profile:

- DCC Financial Representative-The CACFP staff person to contact when questions about claims arise.
- DCC Administrative Representative-The CACFP staff person to contact for all other CACFP related questions. Usually this person is also the Sponsor’s nutritionist (Registered Dietitian).

## 2. Center Manager (also called Sponsor Site Manager)

The Center Manager/Sponsor Site Manager screen displays a list of every Center the Sponsor has had approved. Closed Centers and those with new, unapproved applications are also listed. Here, users can view the status of all Centers and they can begin the process of adding new Centers.

To access the Center Manager:

1. From the **Applications Menu**, select **Sponsor Profile**.
2. Select **Center Manager**.

The Sponsor Site Manager screen displays all Centers that have been active since the beginning of the program year in view.



**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Sponsor Manager >

**Sponsor Site Manager**

7000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
ALBANY

Site #	Site Name	Region	Status
0001	Learning CIPS Main St.	Capital District	Active
0002	Learning CIPS Broad Street	Capital District	Active

< Back | Create New Site

### **Sorting Centers:**

The columns can be sorted. Clicking on each column header allows the user to sort the data on the page.

#### **Example (1)**

Clicking on the column header labeled “Site #” will cause the page to display the Centers in either ascending or descending order depending on the user’s preference. (The first click will sort them ascending and click on the column header again and it will sort it by descending order.)

#### **Example (2)**

Clicking on the column header labeled “Site Name” will cause the page to display the Centers in alphabetical order in either ascending or descending order depending on the user’s preference. (The first click will sort them ascending and click on the column header again and it will sort it by descending order.)

### **Viewing Centers:**

Sponsors can view the Center Profile by clicking on the Center they wish to view from the Sponsor Site Manager. Do not make any changes without talking first to your CACFP administrative representative.

### **Adding New Centers:**

The Sponsor Site Manager is the first step for adding a new Center(s).

To add a new Center:

1. From the **Applications Menu** and then **Sponsor Profile**.
2. Select **Center Manager**.
3. Select **Create New Site**.



**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Sponsor Manager >

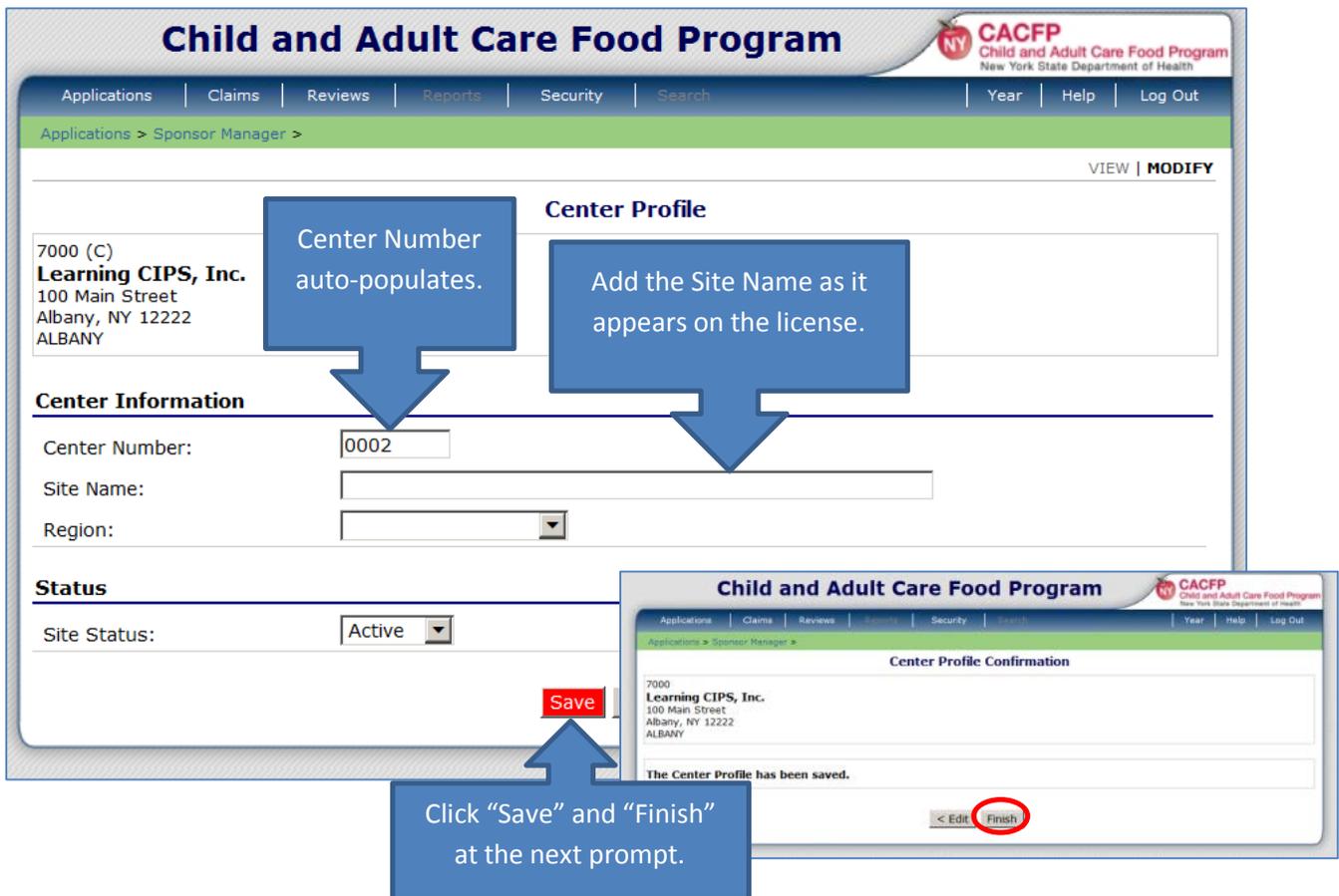
**Sponsor Site Manager**

7000 (C)  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
 ALBANY

Site #	Site Name	Region	Status
0001	Learning CIPS Main St.	Capital District	Active

< Back **Create New Site**

4. A blank Center Profile screen displays with the center number assigned.
  - Enter the Site (Center) name.
  - Select the region- call CACFP if you are unsure what region your Center is in.
  - **Do not** change the Center number.



**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Sponsor Manager >

VIEW | **MODIFY**

**Center Profile**

7000 (C)  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
 ALBANY

**Center Information**

Center Number: 0002

Site Name:

Region:

**Status**

Site Status: Active

**Save**

**Center Profile Confirmation**

7000  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
 ALBANY

The Center Profile has been saved.

< Edit **Finish**

Center Number auto-populates.

Add the Site Name as it appears on the license.

Click "Save" and "Finish" at the next prompt.

5. Select **Save** when done. Click **Finish** when prompted in the next screen, see above. The new Center will be displayed in the Sponsor Site Manager as seen below.



**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Sponsor Manager >

**Sponsor Site Manager**

7000  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
 ALBANY

Site #	Site Name	Region	Status
0001	Learning CIPS Main St.	Capital District	Active
0002	Learning CIPS Broad Street	Capital District	Active

< Back | Create New Site

### Adding Centers- TIPS

- When to add a new Center:
  - If the Center has never been approved to participate in CACFP.
  - If the Center has been on CACFP, but was closed.
  - If a Center currently on CACFP has moved and is operating with a new license.
- Have the license/permit(s) available.
- Each license/permit will have its own Center (site).
- Name the Center the same as it is on the license/permit, unless otherwise directed by CACFP representative.
  - If there is more than one licensed/permitted program with the same name or location, consider adding to the Center name:
    - I/T for Infant and Toddler programs
    - SACC for School age programs
- The Site/Center number will automatically populate in numeric order.
- The status defaults to **“Active”**
- See Chapter 2 for instructions on adding new Centers.

## Application Packet – Center Sponsor

The second item in the Applications menu is the Application Packet- Center Sponsor. This section of CIPS is where most of the Sponsor and Center information is maintained. This information must be updated annually to ensure it is up to date and accurate.



**Child and Adult Care Food Program** CACFP  
Child and Adult Care Food Program  
New York State Department of Health

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Program Year: 2012 - 2013

Item	Description
Sponsor Profile	CACFP Sponsor Profile Information
Application Packet - Center Sponsor	Center Sponsor Applications and Agreement Forms
Advance Requests	Request Sponsor's CACFP Advance(s) for the current year

By clicking the Application Packet- Center Sponsor, users are prompted to select a program year as seen below. This menu is different than the one discussed in “CIPS Navigation”. Sponsors must select the program year for the application packet they wish to view or revise.



**Child and Adult Care Food Program** CACFP  
Child and Adult Care Food Program  
New York State Department of Health

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications >

**Select Program Year**

7000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
ALBANY

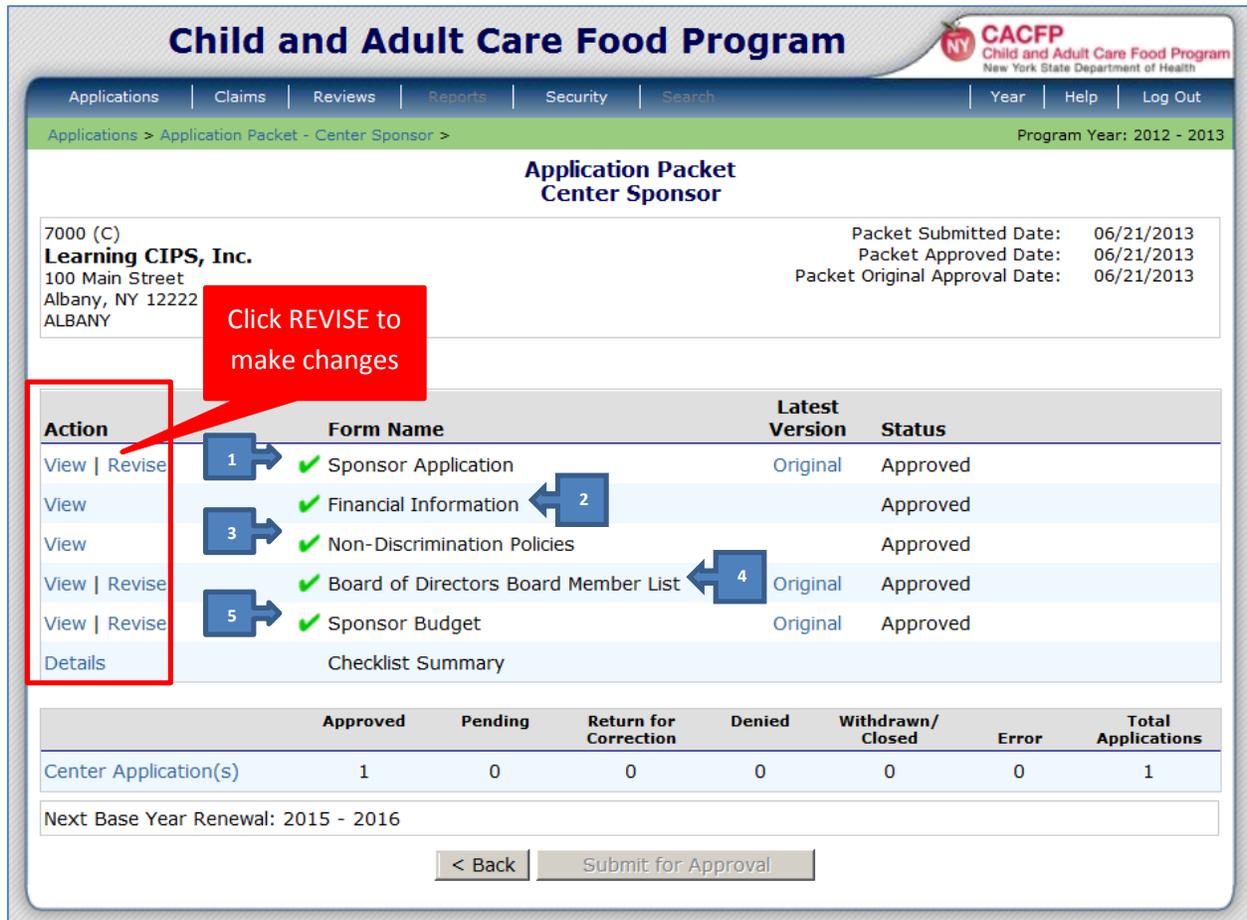
Currently, there are 3 Program Year(s) available. Select the year you wish to access.

Program Year	Date Range	Application Packet
2012 - 2013	10/01/2012 - 09/30/2013	Application Packet on File
2011 - 2012	10/01/2011 - 09/30/2012	Not Started
2010 - 2011	10/01/2010 - 09/30/2011	Not Started

See “Selecting a Program Year- TIPS” on page 9.

[< Back](#)

Once a program year is selected, the Application Packet- Center Sponsor menu opens and users can view or revise information. The screen below is one that a new Sponsor will see. The sections (Form Name) will be described in detail, along with what actions can be performed.



**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Application Packet - Center Sponsor > Program Year: 2012 - 2013

**Application Packet Center Sponsor**

7000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
ALBANY

Packet Submitted Date: 06/21/2013  
Packet Approved Date: 06/21/2013  
Packet Original Approval Date: 06/21/2013

Action	Form Name	Latest Version	Status
View   <b>Revise</b> 1 →	✓ Sponsor Application	Original	Approved
View	✓ Financial Information ← 2		Approved
View	✓ Non-Discrimination Policies		Approved
View   <b>Revise</b> 3 →	✓ Board of Directors Board Member List ← 4	Original	Approved
View   <b>Revise</b> 5 →	✓ Sponsor Budget	Original	Approved
Details	Checklist Summary		

	Approved	Pending	Return for Correction	Denied	Withdrawn/ Closed	Error	Total Applications
Center Application(s)	1	0	0	0	0	0	1

Next Base Year Renewal: 2015 - 2016

< Back | Submit for Approval

**TIP: Always view first!** Make sure changes are necessary. Use the Bread Crumb trail or the Back button to navigate.

### 1- Sponsor Application

This section contains information about the Sponsoring Organization. Users can view, revise or modify many fields in this section by clicking the **LIGHT BLUE** action buttons along the left hand side. It is broken up into 4 continuous sections and they are described below:

#### **Sponsor Description**

General information about the Sponsorship is found here. Some fields cannot be changed here, like the FEIN, Sponsor Type and Municipality Code and not all fields pertain to every Sponsor.

Version: Original

**Sponsor Description**

FEIN	Sponsor Type	Municipality Code
999999999	Independent Center	

- Describe your agency: Nonprofit, Secular
- Are all of your organization's CACFP participating centers located in the same building?  Yes  No
- List the programs and services provided by your organization:  
Child Care
- Sponsor Claims will be reimbursed for Cash-in-Lieu of Commodities:  Yes  No

Do not change the cash-in-lieu vs. commodities option on this screen. Annual mailings sent to Sponsors provide instructions on how to change the preference.

**Addresses**

The address for the physical location (street address) of the Sponsor, the mailing address and payment address are recorded here. All fields can be revised/modified.

- Street Address- If the Sponsors office moves, change it here.
- Mailing Address- This is where all CACFP postal mailings will be sent. If using a P.O. Box, do not complete Address 2 in this section.
- Payment Address- This is where payment is mailed, if the Sponsor is getting a check. It is important to know that if a Sponsor must change their payment address, the Statewide Financial Service (SFS) must be notified. Otherwise, the payment will continue to be sent to the address SFS has on file.

**Addresses**

**Street Address**

- Address 1: 100 Main Street
- Address 2:
- City: Albany
- State: NY Zip: 12222
- County: ALBANY - 001

**Mailing Address**

- Address 1: PO Box 1000
- Address 2:
- City: Albany
- State: NY Zip: 12222

**Payment Address**

- Address 1: 100 Main Street
- Address 2:
- City: Albany
- State: NY Zip: 12222

If making changes to the Payment Address always notify SFS. Failure to do so will result in checks being mailed to an old address.

**Contacts**

The contacts for the Sponsorship are located here. These are the people authorized to communicate with CACFP representatives. Turnover happens! Keep the authorized representatives updated! When staff moves on, be sure to update CIPS. There are 4 contacts that may be authorized. Here is a description of each:

- Sponsor Administrator- the primary contact for CACFP. All postal mailings are addressed to this person, emails are sent to this person’s email address and most phone calls are initially directed to this person. It is recommended this person have knowledge of all CACFP activities within the Sponsorship and be available to answer calls from CACFP.
- Payment Contact- this person will be contacted when there is an issue with claims or payment.
- Authorized Individual 1 & 2- additional people with knowledge of CACFP who can be of assistance when the Sponsor Administrator is not available.
- Staff who have administrative rights in CIPS would be helpful to have as an authorized individual.

<b>Contacts</b>			
<b>Sponsor Administrator</b>			
	Salutation	First Name	Last Name
18. Name:	Ms.	Sally	Jones
19. Facility Phone:	(518) 555-5555	Ext:	Title: Director
20. Cell Phone:		E-Mail: sjones@yahoo.com	
21. Fax:			
<b>Payment Contact</b>			
	Salutation	First Name	Last Name
22. Name:	Ms.	Sally	Jones
23. Facility Phone:	(518) 555-5555	Ext:	Title: Director
24. Cell Phone:		E-Mail: sjones@yahoo.com	
25. Fax:			
<b>Authorized Individual 1</b>			
	Salutation	First Name	Last Name
26. Name:			
27. Facility Phone:		Ext:	Title:
28. Cell Phone:		E-Mail:	
29. Fax:			
<b>Authorized Individual 2</b>			
	Salutation	First Name	Last Name
30. Name:			
31. Facility Phone:		Ext:	Title:
32. Cell Phone:		E-Mail:	
33. Fax:			

Emails are just as important as a telephone number. Keep all contact information up to date.

### **Certification Statement**

The Certification Statement must be checked only when a Sponsor first applies and for the annual renewal (see Chapter 5). By checking the statement, Sponsors confirm they are performing specific tasks required by CACFP and that they are operating in accordance with all CACFP regulations.

The Sponsor agrees to:

- Allow access to all persons without regard to color, race, sex, age, disability or national origin.
- Offer the same meals to all participants enrolled in day care, at no separate charge and without physical segregation or other discriminatory action because of color, race, sex, age, disability or national origin.
- Provide an Income Eligibility Form and Letter to Households in accordance with Federal Regulations.
- Offer access to disabled participants as needed.
- Assist participants who speak a language other than English.
- Meet special dietary requirements for disabled participants as outlined by physician's order.
- Display the *And Justice for All* poster at all centers under their administration.
- Maintain CACFP records at the organization or center location for four years.
- Maintain CACFP financial records separate from other funding.

## **2- Financial Information**

The information on this form is only seen in the program year the Sponsor originally applied. For newly approved Sponsors, this screen will be available during their 1<sup>st</sup> program year. This information is view only.

## **3- Non-Discrimination Policies (See 2-Financial Information)**

## **4- Board of Directors Board Member List**

The current home address and date of birth is required for the Board Chair or owner and Executive Director. Because Board Chairs often change, remember to view or revise this information annually. The owner(s) of a for-profit should choose Board Chair from the drop down list.

## **5- Sponsor Budget**

All new CACFP Sponsoring Organizations have a budget approved during the application process. Some organizations must have a budget approved annually. The most current approved budget will be found here. The only time a budget should be revised is when CACFP sends notice to do so. This happens during the annual renewal (See Chapter 5).

## **6- Checklist Summary (This section currently not in use)**

## Revising the Application Packet- Center Sponsor

When a Sponsor revises any form or application, this will result in new status terms and the screen will look different. Below is an Application Packet that has **not** been revised.

Action	Form Name	Latest Version	Status
View   <b>Revise</b>	✓ Sponsor Application	Original	Approved
View	✓ Financial Information		Approved
View	✓ Non-Discrimination Policies		Approved
View   <b>Revise</b>	✓ Board of Directors Board Member List	Original	Approved
View   <b>Revise</b>	✓ Sponsor Budget	Original	Approved
Details	Checklist Summary		

Click REVISE to make changes.

Clicking REVISE will create a new version. Versions will be labeled as follows:

- Original- First approved form/application. Seen when a Sponsor is newly approved and when the annual renewal is approved.
- Rev. 1, Rev. 2, etc- Each time a Sponsor clicks REVISE a new version is created.

The Application Packet below illustrates what one could expect to see when a form is revised and submitted. Notice several changes below:

Action	Form Name	Latest Version	Status
View   Modify   Admin	➔ Sponsor Application	Rev. 3	Submitted
View   <b>Revise</b>	✓ Board of Directors Board Member List	Original	Approved
View	✓ Sponsor Budget	Rev. 1	Approved

Red arrow= Form is not yet approved.

This Sponsor Application has been revised 3 times, the Board of Directors is still from the original approval and the Sponsor Budget was revised once. Click the Latest Version to see the old forms.

Click MODIFY to make changes after the initial revision. Modify does not create a new version.

After clicking the Latest Version (in LIGHT BLUE) a list of previous versions will appear.

The current version will be at the top of the list. Older versions follow, see the Approved Date in the far right column. Click the month/year to see previous versions.

7000 (C) <b>Learning CIPS, Inc.</b> 100 Main Street Albany, NY 12222 ALBANY			
Effective Claim Period	Version	Status	Approved Date
Jun 2013	Rev. 2	Approved	07/12/2013
Jun 2013	Rev. 1	Approved	07/12/2013
Jun 2013	Original	Approved	06/21/2013

Action	Form Name	Latest Version	Status
View   Modify	✓ Sponsor Application	Rev. 3	Not Submitted
View	✓ Financial Inform		pproved
View	✓ Non-Discrimina		pproved
View   Revise	✓ Board of Direct		pproved
View   Revise	✓ Sponsor Budge		pproved
Details	Checklist Sumr		

**Always remember to click  
\*SUBMIT FOR APPROVAL\*  
CACFP cannot approve any  
changes until the packet is  
submitted.**

	Approved	Pending	Retur Corre	Denied	Withdrawn/ Closed	Error	Total Applications
Center Application(s)	1	0		0	0	0	1

Next Base Year Renewal: 2015 - 2016

### Application Packet- Status TIPS

**Not Submitted-** Submit for Approval has not been clicked

**Approved-** The latest revisions are fully approved by the State.

**Submitted-** Changes have been made, the forms are complete and the packet has been submitted for approval. The Application Packet and Center Applications are VIEW only once an application has been submitted.

**Error-** A required field was left blank. Go back into the form and make sure it is complete.

**Pending Validation-** A change was made, the application was not saved. Go back into the form, re-enter changes, click SAVE at the bottom of the screen, then click FINISH

**Return for Correction-** The State has returned a center application because the changes submitted were incomplete or incorrect. The Sponsor must modify the application and resubmit the Application Packet for approval.

**Withdrawn/Closed-** The Sponsor or State has closed the Center.

## Advance Request

Advance Request is the last sub-menu item under Applications. Advance payments are financial assistance made available to an institution for Program costs prior to the month in which the costs will be incurred. If a particular sponsor has already been approved for an advance, it will be shown at the bottom of this screen. If the screen has the message, “There are no advances requested for this year” it means that there has not been a request for an advance. If you are interested in an advance, please contact your administrative representative (found at the Sponsor Profile) to discuss this.



**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Advance Requests > Program Year: 2012 - 2013

**Child & Adult Care Centers Advance Requests  
for 2012 - 2013**

7000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
ALBANY

There are no advances requested for this year.

[Create New Request](#)

[< Back](#)

# Chapter 2 – Center Applications

All approved Sponsors have at least one active Center. In CIPS, each Center has its own application where all the site detail is stored. The Center applications are located in the **Centers Application Packet**.

How to access to the Centers Application Packet:

1. From the Applications Menu, select **Application Packet- Center Sponsor**.
2. Select the **Program Year** you wish to access.
3. From the Application Packet- Center Sponsor page, select **Center Application(s)**

Action	Form Name	Latest Version	Status
View   Modify	✔ Sponsor Application	Rev. 3	Not Submitted
View	✔ Financial Information		Approved
View	✔ Non-Discrimination Policies		Approved
View   Revise	✔ Board of Directors Board Member List	Original	Approved
View   Revise	✔ Sponsor Budget	Original	Approved
Details	Checklist Summary		

	Approved	Pending	Return for Correction	Denied	Withdrawn/ Closed	Error	Total Applications
Center Application(s)	1	0	0	0	0	0	1

Click here to access the Application Packet- Center List

This is a summary of Center Status.

## The Centers Application Packet- Center List

All Centers that were active since October 1st are listed here, even if they have been closed since.

- Active Centers will have a green check ✔ .
- Centers that were closed during the program year will have a red dot ● .
  - When hovering over the ● , the date the Center was closed will appear.
- Centers in the process of being revised or added will have a red arrow ➡ .



**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Application Packet - Center Sponsor > Packet Center List - CACFP > Program Year: 2012 - 2013

**Child & Adult Care Centers**  
**Application Packet - Center List for 2012 - 2013**

7000 (C)  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
 ALBANY

Action	Center #	Center Name	Type	Latest Version	Status
View   Revise	✓ 0001	Learning CIPS Main St.	CC	Original	Approved

Add Center

**Total Centers Enrolled: 1**

< Back

### Center #/Center Name

All Centers are listed in numeric order by Center number. The list can be sorted, just like in the Center Manager (see Chapter 1 for information on the Center Manager).

- Sort by clicking on the **LIGHT BLUE** column headings. This feature is helpful for Sponsors that have many Centers and cannot remember the Center number, but knows the Center name.

### Type

The Center Type is listed as well. There are 5 different types of Centers a user may see:

**AC-** Adult Care  
**SA-** School-age  
**HS-** Head Start

**CC-** Child Care  
**AR-** At-risk Program  
**Shelter-** Homeless/DV Shelter

### Latest Version

The Latest Version column indicates the number of revisions made to the Center application during the program year. Each time a user clicks revise, a new version is created. To view a list of previous versions, click the **LIGHT BLUE** version (Original, Rev. 1, Rev. 2, etc). The versions are listed with the most current at the top, and the oldest at the bottom. By viewing previous versions, users can see what information has been changed each time.

## **Status**

The Center Status identifies if a Center is approved, somewhere in the middle of a revision or closed. See “Application Packet- Status TIPS” on page 24 for more information.

## **Maintaining the Center Application**

There are 5 actions that can be performed in the Center application section of CIPS: view, revise, modify, add and close. Sponsors are responsible for keeping Center applications up to date.

### **Viewing Centers**

By clicking VIEW, a user can view the Center application. No changes can be made. It is recommended that users view the Center application before clicking revise to see what needs to be updated. Clicking VIEW will open the Center application and all tabs can be reviewed.

### **Revising Centers**

Clicking REVISE will create a new version. Click REVISE to make changes.

A Sponsor will need to revise a Center for many reasons. At the very least, the Center applications will be updated annually. Here are some common reasons for updating the Center Applications:

#### **Annual Updates**

- Participant Data (Ethnic/Racial tab)
- New Vendor Contract or when an Extension is complete

#### **Every 2-4 Years**

- License/permit/approval to operate is renewed (send a copy to CACFP)

#### **Other Reasons**

- License is amended (send to CACFP)
- Contact information changes
- Schedule changes
- To change meal approvals (send menu to CACFP if adding a meal or snack)
- To change meal preparation (contact CACFP)

If a sponsor is revising because of a move, change in tax status or affiliation, contact CACFP.

Action	Center #	Center Name
View   Revise	✓ 0001	Learning CIPS Main St.
View   Modify	➔ 0002	Learning CIPS Broad Street
Add Center		
<b>Total Centers Enrolled: 2</b>		
<input type="button" value=" &lt; Back"/>		

1. Click **REVISE** to initiate a new version.

2. Enter all required information- see “The Center Application” in this chapter.

Click **MODIFY** after a revision or new application has been started and additional changes are needed. Modifications are made prior to State approval. This will not create a new version.

### Adding Centers

Sponsors may add a new Center at any time. New Centers include those that are newly licensed/registered or otherwise approved to provide services. A new Center can also be one that used to be on CACFP but was closed. Another reason for adding a new Center may include change in location or type of program.

### Adding a Center in CIPS is a 2 step process:

1. **CREATE** the new Site in the Sponsor Profile-Center Manager. See Chapter 1 for instructions.
2. **ADD** the new Site in the Application Packet- Center List. Click **ADD CENTER**.

Action	Center #	Center Name
View   Revise	✓ 0001	Learning CIPS Main St.
View   Revise	✓ 0002	Learning CIPS Broad Street
<b>Add Center</b>		
<b>Total Centers Enrolled: 2</b>		
<input type="button" value=" &lt; Back"/>		

Whether adding a new Center or revising previously approved Centers, the screens will look the same. There are six tabs within each center application.

## The Center Application



**Child and Adult Care Food Program**

Home | Reports | Security | Search

Home > Sponsor > Packet Center List - CACFP > Program Year: 2012 - 2013

VIEW Show Changes

**Child & Adult Care Centers Center Application for 2012 - 2013**

7000 (C)  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
 ALBANY

0001  
**LEARNING CIPS MAIN ST.**  
 100 Main Street  
 Albany, NY 12222  
 ALBANY

Version: Rev. 1

Summary | Lic./Reg. | Contacts | Hours/Meals | Ethnic/Racial | Cert

Item	Center Status	Error(s)	State Status	Error(s)
A. License / Registration	Approved	0	Approved	0
B. Contacts	Approved	0	Approved	0
C. Hours / Meals	Approved	0	Approved	0
D. Ethnic / Racial	Approved	0	Approved	0
E. Certification	Approved	0	Approved	0

Created By: mpoppins on: 7/17/2013 9:19:40 AM Modified By: mpoppins on: 7/17/2013 9:20:08 AM

< Back

Show Changes VIEW

The detail for each Center is stored in the Center application. There are 6 tabs, only 5 of them have fields that can be edited. The first tab is the "Summary". It provides the status of each tab at a glance.

### Important to Know

- When revising, modifying or adding a new Center the user must click through each tab. If tabs are skipped, the application will be incomplete and cannot be approved.

#### 1. Lic/Reg

The Lic/Reg tab is where much of the information from a Center license/permit or other type of approval is stored. The licensed capacity, an important figure for claiming, is located here as well. The following image is what a user will see. Some additional guidance and tips have been added in blue:

**Child & Adult Care Centers  
Center Application for 2012 - 2013**

7000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
ALBANY

0001  
**LEARNING CIPS MAIN ST.**  
100 Main Street  
Albany, NY 12222  
ALBANY

Version: Rev. 1

Summary Lic./Reg. Contacts Hours/Meals Ethnic/Racial Cert

**License / Registration Information**

A1. Center Type: Child Care  
A2. Type of Approval: Licensed/Registered by OCFS  
A3. License Number: 12345  
A4. License Effective Date: 06/03/2013  
A5. License Expiration Date: 06/02/2015  
A6. License Capacity: 50  
A7. Age Range of Participants: From: 2 Yrs 0 Mos To: 6 Yrs 0 Mos

Information for A1- A7 are data entered based on the license/permit/approval to operate. License exempt programs will leave A3-A6 blank. Update this section whenever a new or amended license/permit is issued. Send a copy of the approval

A8. Do you provide child care for infants under 12 months old?  Yes  No

A9. Enter the elementary, middle or high school a child would attend if he/she lived next door to this center:

Name: My School

Address: 50 School Rd., Albany, NY 12222

**Street Address**

A10. Address 1: 100 Main Street  
A11. Address 2:  
A12. City: Albany  
A13. State: NY Zip: 12222  
A14. County: ALBANY - 001

The location should match the license/permit or approval to operate.

**Mailing Address**

A15. Address 1: 100 Main Street  
A16. Address 2:  
A17. City: Albany  
A18. State: NY Zip: 12222

**Center Information**

A19. Affiliation:  Affiliated  Unaffiliated

Affiliated means the center is an actual part of the sponsoring organization.  
Unaffiliated means the center is not a part of the sponsoring organization.

A20. Tax Status:  For Profit  Non Profit

For Centers that are owned and operated by the Sponsor, click Affiliated. If the Center being added/revised is owned by another organization or company- contact CACFP for guidance.

Created By: mpoppins on: 7/17/2013 9:19:40 AM Modified By: mpoppins on: 7/17/2013 9:20:08 AM

Next

Click Next to move on to the next screen

## 2. Contacts

The Contacts tab contains contact information on the people in charge of the Center on a daily basis. It should be revised whenever a change occurs.

Child and Adult Care Food Program



**CACFP**  
Child and Adult Care Food Program  
New York State Department of Health

Applications | Claims | Reviews | Reports | Security | Search
Year | Help | Log Out

Applications > Application Packet - Center Sponsor > Packet Center List - CACFP >
Program Year: 2012 - 2013

[VIEW](#) | [MODIFY](#)  
[Show Changes](#)

Child & Adult Care Centers  
 Center Application for 2012 - 2013

7000 <b>Learning CIPS, Inc.</b> 100 Main Street Albany, NY 12222 ALBANY	0002 <b>LEARNING CIPS BROAD STREET</b> 100 Broad Street Albany, NY 12222 ALBANY
---	---

<a href="#">Summary</a>	<a href="#">Lic./Reg. ✓</a>	<a href="#">Contacts ✓</a>	<a href="#">Hours/Meals ✓</a>	<a href="#">Ethnic/Racial ✓</a>	<a href="#">Cert ✓</a>
-------------------------	-----------------------------	----------------------------	-------------------------------	---------------------------------	------------------------

**Center Contact - Person in charge of this center on a daily basis**

B1. Name:	Salutation: <input type="text" value="Ms."/>	First Name: <input type="text" value="Mary"/>	Last Name: <input type="text" value="Poppins"/>
B2. Facility Phone:	<input type="text" value="(518) 123-4567"/>	Ext: <input type="text"/>	Title: <input type="text" value="Site Director"/>
B3. Cell Phone:	<input type="text"/>	E-Mail: <input type="text" value="mpoppins@yahoo.com"/>	
B4. Fax:	<input type="text"/>		

**Additional Center Contact - Alternate person in charge of this center on a daily basis**

B5. Name:	Salutation: <input type="text"/>	First Name: <input type="text"/>	Last Name: <input type="text"/>
B6. Facility Phone:	<input type="text"/>	Ext: <input type="text"/>	Title: <input type="text"/>
B7. Cell Phone:	<input type="text"/>	E-Mail: <input type="text"/>	
B8. Fax:	<input type="text"/>		

Created By: mpoppins on: 7/17/2013 10:57:22 AM    Modified By: mpoppins on: 7/17/2013 11:48:01 AM

[Show Changes](#)  
[VIEW](#) | [MODIFY](#)

Users can also click the tabs to move within the Center application.

Click Next to move on to the next screen, Previous view or edit Lic/Reg information OR Cancel to exit the Center application.

## 3. Hours/Meals

The Hours/Meals section holds information about Center schedule, meal approvals and meal preparation. If a Sponsor uses a vendor, the most recent contract information is entered here as well. It is viewed as one continuous page, however for training purposes it is broken into sections.

Meals- The meals and snacks a Sponsor is requesting reimbursement for. The meals and snacks must be approved prior to claiming. Addition of a meal/snack or days of operation require submission of a current menu for approval.

Regular vs. Holiday, Weekend, or School Vacation Schedule- Some programs only operate one set schedule, for example traditional day care. However some, like afterschool programs can have different scheduling and meal approvals on non-school days. See below:

Summary | Lic./Reg. ✓ | Contacts ✓ | Hours/Meals ✓ | Ethnic/Racial ✓ | Cert ✓ | Version: Rev. 1

### Schedule

C1. A. Months of Operation (Check all that apply) All:  Jan:  Feb:  Mar:  Apr:  May:  Jun:   
Jul:  Aug:  Sep:  Oct:  Nov:  Dec:

B. Days of Operation (Check all that apply) Mon-Fri:   
Mon:  Tue:  Wed:  Thu:  Fri:  Sat:  Sun:

### Regular Schedule

C2. Schedule the Center is open Time Open: 3 PM :00 Time Close: 6 PM :00

C3. Hours meals are served

Meals	# Participants	Start Time	End Time
<input type="checkbox"/> Breakfast			
<input type="checkbox"/> AM Snack			
<input type="checkbox"/> Lunch			
<input checked="" type="checkbox"/> PM Snack	65	3 PM :30	4 PM :00
<input type="checkbox"/> Supper			
<input type="checkbox"/> Evening Snack			
<input type="checkbox"/> At-Risk Snack			
<input type="checkbox"/> At-Risk Supper			

### Holiday, Weekend, or School Vacation Schedule

C4. Schedule the Center is open  Check if the same as Regular Schedule  
Time Open: 6 AM :30 Time Close: 6 PM :00

C5. Hours meals are served  Check if the same as Regular Schedule

Meals	# Participants	Start Time	End Time
<input checked="" type="checkbox"/> Breakfast	70	8 AM :00	8 AM :30
<input type="checkbox"/> AM Snack			
<input checked="" type="checkbox"/> Lunch	75	12 Noon :00	12 Noon :45
<input checked="" type="checkbox"/> PM Snack	65	3 PM :30	4 PM :00
<input type="checkbox"/> Supper			
<input type="checkbox"/> Evening Snack			
<input type="checkbox"/> At-Risk Snack			
<input type="checkbox"/> At-Risk Supper			

Months/Days must be approved for claiming.

Sponsors must keep their meal schedules up to date. This is an example of an afterschool program's Regular Schedule.

Some afterschool programs are open for child care on days school is closed. This is an example of the programs schedule on non-school days. Notice the approvals and information are different.

How food is prepared for each Center is documented in the Center application.

C6. How is the food prepared?

A. Prepared at this center  
 B. Prepared at Organization's central kitchen  
 C. Purchased from a local school system  
 D. Purchased from a food service vendor

C7. Check all meals that are purchased through a food service vendor:

Breakfast    Lunch    Supper    Snacks

C8. Do you have a food service contract?

Yes    No

C9. Name of Food Service Vendor:

Food Vendor

C10. Contract Period:

From: 01/01/2013 To: 12/31/2013

Created By: mpoppins on: 7/17/2013 10:57:22 AM Modified By: mpoppins on: 7/17/2013 10:57:29 AM

VIEW | MODIFY

Check the box that describes the type of food preparation.

Add the details from a vended contract annually.

Click Next to move on to the next screen, Previous view or edit the previous screens OR Cancel to exit the Center application.

Purchasing food from an outside vendor? Call CACFP for guidance on how to obtain a Vendor Contract.

## How is the Food Prepared? TIPS

**Prepared at this center-** Check this box if all meals/snacks are prepared in the Center's on-site kitchen.

**Prepared at Organization's central kitchen-** Check this box if the Center does not have an on-site kitchen, but the food is supplied by the Sponsor. Usually it is prepared at another Center that does have an on-site kitchen and is transported to at least one other Center/Site.

**Purchased from a local school system-** Check this box if the meals are purchased from a school.

**Purchased from a food service vendor-** Check this box if the meals are purchased through a private food service company such as a caterer, restaurant or other permitted establishment.

\*\* Some Sponsors will prepare a simple snack on-site, but contract with a vendor meals. In that case, check both- Prepared at this center AND Purchased from a school or food service vendor.

#### 4. Ethnic /Racial

Update this information annually. For CIPS Certified Sponsors, D4 and D5 take the place of the Participant Data Form, usually mailed to Sponsors not using CIPS in the Spring.

Version: Rev. 1

Summary
Lic./Reg. ✓
Contacts ✓
Hours/Meals ✓
Ethnic/Racial ✓
Cert ✓

### Participants

D1. Number of enrolled participants in each income eligibility category:

A. Free Category:	<input style="width: 80%;" type="text" value="30"/>
B. Reduced Category:	<input style="width: 80%;" type="text" value="15"/>
C. Paid Category:	<input style="width: 80%;" type="text" value="25"/>
D. Total Enrolled:	<input style="width: 80%;" type="text" value="70"/>

D2. The above numbers are:  Estimate  Actual

D3. Does this center provide transportation to participants?  No

Yes, it is available to all participants

Yes, it is available to only these participants

Describe participants:

---

D4. *By visual observation, using your best judgement, what number of participants in care at this center fall into each ethnic category?*

	Count
HISPANIC OR LATINO - A person of Cuban, Mexican, Puerto Rican, South or Central South American, or other Spanish culture or origin, regardless of race.	<input style="width: 80%;" type="text" value="15"/>
NOT HISPANIC OR LATINO	<input style="width: 80%;" type="text" value="55"/>

---

D5. **How many participants attend this center from each racial category?**

	Count
AMERICAN INDIAN OR ALASKAN NATIVE - A person having origins in any of the original peoples of North or South America, and who maintains tribal affiliations or community attachment (includes Aleuts and Eskimos).	<input style="width: 80%;" type="text" value="3"/>
ASIAN - A person having origins in any of the original peoples of the Far East, Southeast Asia or the Indian subcontinent. This area includes China, Japan, Korea, India and the Philippine Islands.	<input style="width: 80%;" type="text" value="10"/>
BLACK OR AFRICAN AMERICAN - A person having origins in any of the black racial groups of Africa.	<input style="width: 80%;" type="text" value="30"/>
NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER - A person having origins in any of the original peoples of Hawaii, Guam, Samoa or other Pacific Islands.	<input style="width: 80%;" type="text" value="2"/>
WHITE - A person having origins in any of the original peoples of Europe, North Africa or the Middle East.	<input style="width: 80%;" type="text" value="30"/>

Created By: mpoppins on: 7/17/2013 10:57:22 AM    Modified By: mpoppins on: 7/17/2013 11:54:42 AM

Previous
Next
Cancel

Click Next to move on to the next screen, Previous to view or edit the previous screens OR Cancel to exit the Center application.

## 5. Cert

In order to complete a Center Application, users must read and agree to the Certification Statement. Place a check mark in the Certification Statement box by clicking on the box. When finished, click on the **FINISH** button.

<p>7000 <b>Learning CIPS, Inc.</b> 100 Main Street Albany, NY 12222 ALBANY</p>	<p>0002 <b>LEARNING CIPS BROAD STREET</b> 100 Broad Street Albany, NY 12222 ALBANY</p>
--	--

**The Center Application has been saved.**

< Edit
Finish

<p>7000 <b>Learning CIPS, Inc.</b> 100 Main Street Albany, NY 12222 ALBANY</p>	<p>0002 <b>LEARNING CIPS BROAD STREET</b> 100 Broad Street Albany, NY 12222 ALBANY</p>
--	--

**The Center Application has been saved.**

< Edit
Finish

The user will be prompted to finish a 2<sup>nd</sup> time as seen below- click **FINISH** again.

After clicking **Finish** the 2<sup>nd</sup> time- users are brought back to the Summary tab and the Status will say Pending Approval. If there are Errors or other issues, the status will indicate the tab and what the error is.

<p>7000 <b>Learning CIPS, Inc.</b> 100 Main Street Albany, NY 12222 ALBANY</p>	<p>0002 <b>LEARNING CIPS BROAD STREET</b> 100 Broad Street Albany, NY 12222 ALBANY</p>
--	--

Summary
Lic./Reg. ✓
Contacts ✓
Hours/Meals ✓
Ethnic/Racial ✓

Item	Center Status	Error(s)
✓ A. License / Registration	Pending Approval	
✓ B. Contacts	Pending Approval	
✓ C. Hours / Meals	Pending Approval	0
✓ D. Ethnic / Racial	Pending Approval	0
✓ E. Certification	Pending Approval	

Created By: mpoppins on: 7/17/2013 10:57:22 AM Modified By: mpoppins on: 7/17/2013 12:01:34 PM

< Back

Remember: Click Back to Submit your Application for approval

Code	Error Description
303008	'License Capacity' must be answered.

Version: Rev. 2

Summary
Lic./Reg. ✗
Contacts ✓
Hours/Meals ✓
Ethnic/Racial ✓
Cert ✓

Item	Center Status	Error(s)	State Status	Error(s)
✗ A. License / Registration	Error	1	Error	0
✓ B. Contacts	Pending Approval	0	Pending Approval	0

Users must correct any errors before submitting the application.

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Application Packet - Center Sponsor > Program Year: 2012 - 2013

### Application Packet Center Sponsor

07000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
ALBANY

Packet Submitted Date:  
Packet Approved Date:  
Packet Original Approval Date: 08/08/2013

Action	Form Name	Latest Version	Status
View   Modify	✓ Sponsor Application	Rev. 1	Not Submitted
View	✓ Financial Inform		Approved
View	✓ Non-Discrimin		Approved
View   Revise	✓ Board of Direc		Approved
View   Revise	✓ Sponsor Budg		Approved
Details	Checklist Sum		

Always remember to click  
**\*SUBMIT FOR APPROVAL\***  
CACFP cannot approve any  
changes until the packet is  
submitted.

	Approved	Pending	Retu Corr	Denied	Withdrawn/ Closed	Error	Total Applications
Center Application(s)	1	0	0	0	0	0	1

Next Base Year Renewal: 2015 - 2016

## Closing a Center

Centers are closed in the **Center Application History**.

To access this page:

1. From the Centers Application Packet- Center List select the **LATEST VERSION** (Ex: Original, Rev. 1, Rev. 2, etc) of the Center to be closed. This will open the Center Application History.

Action	Center #	Center Name	Type	Latest Version	Status
View   Revise	✓ 0001	Learning CIPS Main St.	CC	Rev. 2	Approved
View   Modify	➔ 0002	Learning CIPS Broad Street	CC	Rev. 2	Not Submitted
Add Center					
<b>Total Centers Enrolled: 2</b>					

2. In the lower right corner click **CLOSE CENTER**.

7000 <b>Learning CIPS, Inc.</b> 100 Main Street Albany, NY 12222 ALBANY	0001 <b>LEARNING CIPS MAIN ST.</b> 100 Main Street Albany, NY 12222 ALBANY
---	--

Action	Effective Claim Period	Version	Status	Approved Date
<a href="#">View</a>	Jun 2013	3 (Rev. 2)	Approved	07/17/2013
<a href="#">View</a>	Jun 2013	2 (Rev. 1)	Approved	07/17/2013
<a href="#">View</a>	Jun 2013	1 (Original)	Approved	06/21/2013

< Back
Close Center

3. Input the effective date, select **SELF CANCELLED** and type in the reason.
4. Click **SAVE**.

7000 <b>Learning CIPS, Inc.</b> 100 Main Street Albany, NY 12222 ALBANY	0001 <b>LEARNING CIPS MAIN ST.</b> 100 Main Street Albany, NY 12222 ALBANY
---	--

**Enrollment Information**

Closed/Terminated Date:  (mm/dd/yyyy)

Closed/Terminated Code:

Closed/Terminated Reason:

Comment(s):

Save
Cancel

After clicking save, the Center Application History will display the status across the top in red.

7000 <b>Learning CIPS, Inc.</b> 100 Main Street Albany, NY 12222 ALBANY	0001 <b>LEARNING CIPS MAIN ST.</b> 100 Main Street Albany, NY 12222 ALBANY
---	--

**The Center's enrollment was closed/terminated as of: 08/01/2013.**

Action	Effective Claim Period	Version	Status	Approved Date
<a href="#">View</a>	Jun 2013	3 (Rev. 2)	Approved	07/17/2013
<a href="#">View</a>	Jun 2013	2 (Rev. 1)	Approved	07/17/2013
<a href="#">View</a>	Jun 2013	1 (Original)	Approved	06/21/2013

< Back

When viewing the Application Packet-

Center List, the closed Center will have the red dot, but still have an approved status. The center will only be viewable, no revisions or modifications can be made.

7000 (C) <b>Learning CIPS, Inc.</b> 100 Main Street Albany, NY 12222 ALBANY	
---	--

Action	Center #	Center Name	Type	Latest Version	Status
<a href="#">View</a>	● 0001	Learning CIPS Main St.	CC	Rev. 2	Approved
<a href="#">View   Modify</a>	➔ 0002	Learning CIPS Broad Street	CC	Rev. 2	Not Submitted
<a href="#">Add Center</a>					

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Sponsor Manager >

### Sponsor Site Manager

7000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
ALBANY

Site #	Site Name	Region	Status
0001	Learning CIPS Main St.	Capital District	Inactive
0002	Learning CIPS Broad Street	Capital District	Active

< Back   Create New Site

The Center status in the Sponsor Site Manager (found in Sponsor Profile), will default to Inactive.

Sponsors do not have to submit the application when closing a Center. This action does not require CACFP approval. However, the Sponsor may wish to speak with their

Administrative Representative if there are outstanding issues that need to be addressed.

# Chapter 3 – Claims

## Submitting an Original Claim

An original claim (first time submission) must be postmarked within 60 days after the last day of the claim month. Keep CACFP’s 60/90 day calendar for easy reference to avoid missing deadlines.

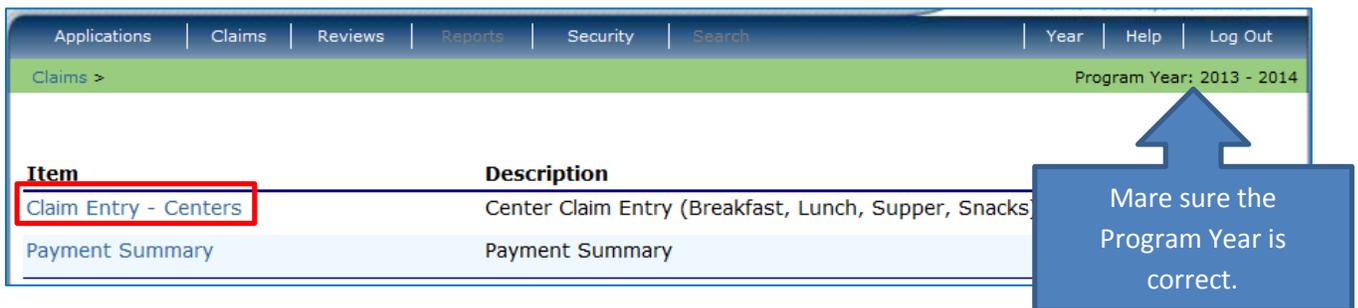
**When submitting claims electronically, DO NOT send CACFP a paper claim in the mail.** Paper documentation used to tabulate the claim must continue to be maintained in accordance with CACFP Regulations. This documentation may include attendance records, meal count sheets and income eligibility forms.

**To submit an original claim:**

1. Click **CLAIMS** at the **DARK BLUE** CIPS Menu bar



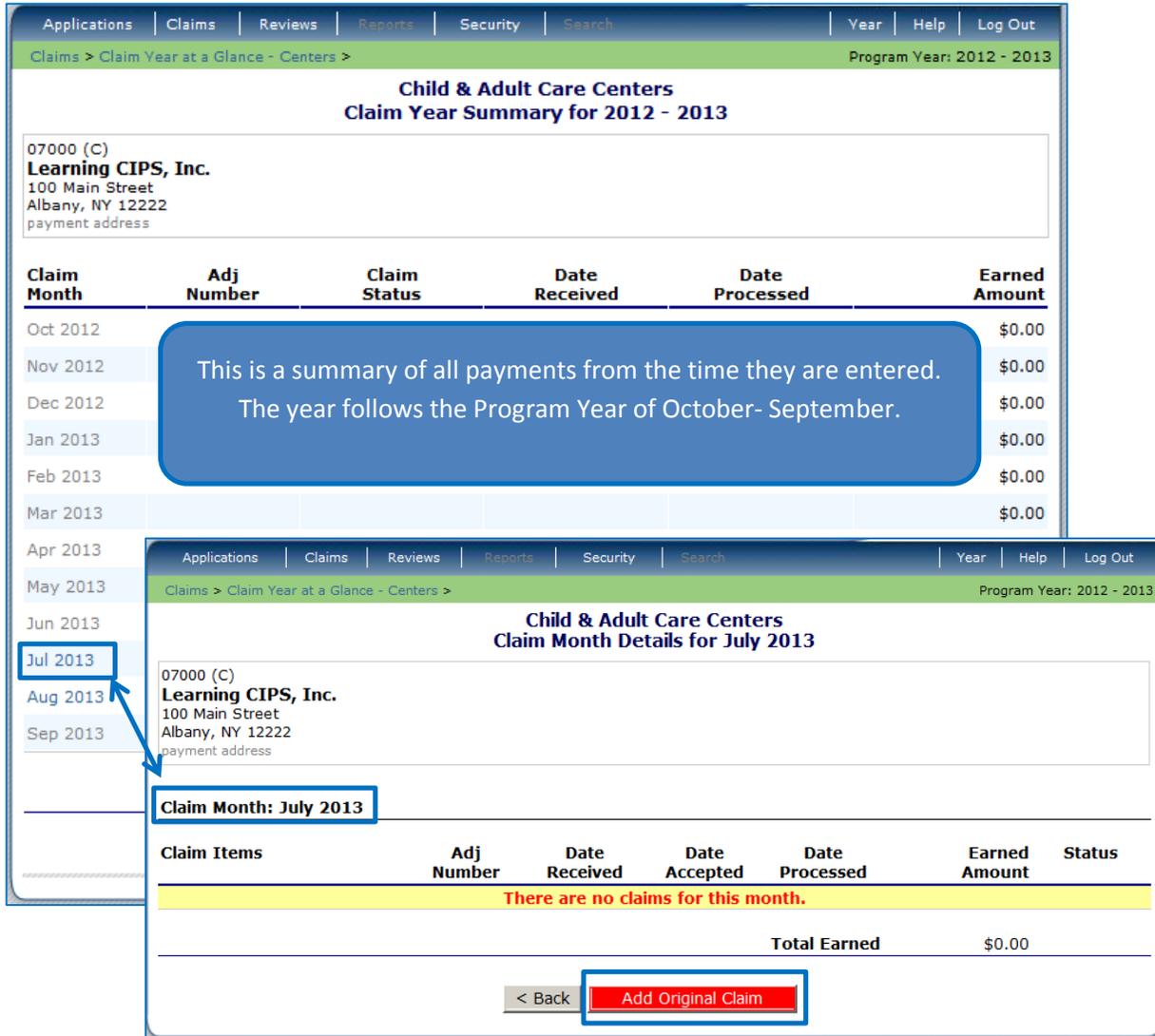
2. Click **CLAIM ENTRY- CENTERS** from the menu list. This will open the **Claim Year Summary** for the current fiscal year



### Program Year

The new Program Year is available on September 1<sup>st</sup> in CIPS. When submitting claims, always be sure the correct Program Year is open. See “CIPS Navigation” for more detail on the Program Year.

3. Click on the month of the claim to be entered.



Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Claims > Claim Year at a Glance - Centers > Program Year: 2012 - 2013

**Child & Adult Care Centers  
Claim Year Summary for 2012 - 2013**

07000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
payment address

Claim Month	Adj Number	Claim Status	Date Received	Date Processed	Earned Amount
Oct 2012					\$0.00
Nov 2012					\$0.00
Dec 2012					\$0.00
Jan 2013					\$0.00
Feb 2013					\$0.00
Mar 2013					\$0.00
Apr 2013					\$0.00
May 2013					\$0.00
Jun 2013					\$0.00
<b>Jul 2013</b>					\$0.00
Aug 2013					\$0.00
Sep 2013					\$0.00

This is a summary of all payments from the time they are entered.  
The year follows the Program Year of October- September.

---

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Claims > Claim Year at a Glance - Centers > Program Year: 2012 - 2013

**Child & Adult Care Centers  
Claim Month Details for July 2013**

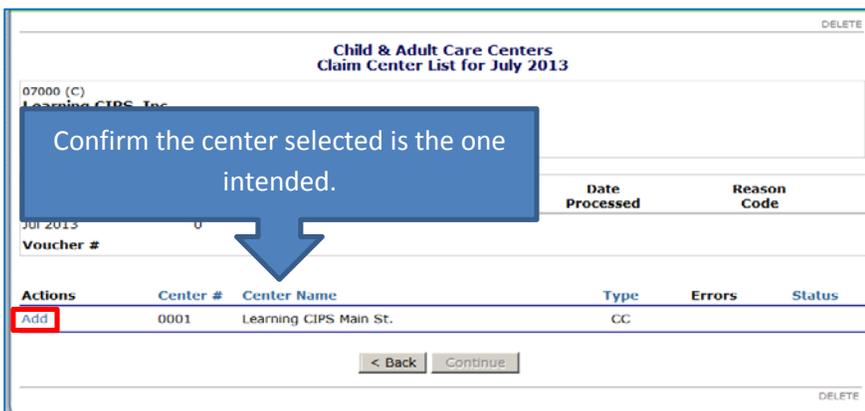
07000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
payment address

**Claim Month: July 2013**

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
<b>There are no claims for this month.</b>						
<b>Total Earned</b>					\$0.00	

< Back **Add Original Claim**

4. Click **ADD ORIGINAL CLAIM**. This will open the **Claim Center List** for the selected month.



Child & Adult Care Centers  
Claim Center List for July 2013

07000 (C)  
**Learning CIPS, Inc.**

July 2013

Voucher #

Actions	Center #	Center Name	Type	Errors	Status
<b>Add</b>	0001	Learning CIPS Main St.	CC		

< Back Continue

Confirm the center selected is the one intended.

5. Click **ADD** for the Center being claimed. There may be more than one Center claimed each month. They will be added individually. Always check to verify the Center being entered is the one open on the screen.

6. Enter all required information in the fields that are open.
7. Click **SAVE** when finished **OR** if the user notices an error (like they entered the wrong month or center data) click **DELETE**.

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Claims > Claim Year at a Glance - Centers > Program Year: 2012 - 2013

VIEW | MODIFY | **DELETE**

### Child & Adult Care Centers Center Claim Report for July 2013

07000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
payment address

0001  
**LEARNING CIPS MAIN ST.**  
100 Main St.  
Albany, NY 12222  
ALBANY

Verify the right center is open.



Month/Year Claimed	Adjustment Number	Date Received	MIR Date	Date Accepted	Date Processed	Reason Code
Jul 2013	0					
<b>Voucher #</b>						

**Child Care Center**

**Attendance Reporting**

	Quantity	
C1. Total Days of Operation:	<input style="width: 50px;" type="text"/>	← Obtained from Attendance Record
C2. Total Attendance:	<input style="width: 50px;" type="text"/>	
C3. Average Daily Attendance:		
C4. Number of Shifts:	1	
C5. License Capacity:	50	

**Number of enrolled participants in each reimbursement category**

	Quantity	
C6. Free Category:	<input style="width: 50px;" type="text"/>	← Obtained from Income Eligibility Forms and Attendance Record
C7. Reduced Category:	<input style="width: 50px;" type="text"/>	
C8. Paid Category:	<input style="width: 50px;" type="text"/>	
C9. Total Enrolled:	0	

**Child Meals / Snacks Served**

	Total	
C10. Breakfast:	<input style="width: 50px;" type="text"/> 0	← Obtained from Meal Count Record
C11. AM Snack:	<input style="width: 50px;" type="text"/> 0	
C12. Lunch:	<input style="width: 50px;" type="text"/> 0	
C13. PM Snack:	<input style="width: 50px;" type="text"/> 0	
C14. Supper:	0	
C15. Night Snack:	0	

Created By: mpoppins on: 8/20/2013 3:35:34 PM Modified By: mpoppins on: 8/20/2013 3:35:35 PM

**What happens after SA**

The User ID of the person who worked on the claim appears at the bottom of the screen along with a date/time stamp. Hover over the username will reveal the persons name.

43

CIPS compares the claim figures against the Center approvals and performs edit checks on the data entered. The Status will display **Validated** for Center's that pass all checks. Enter the next center if applicable.

- When all Centers claimed have a status of validated, the user can click **CONTINUE**.

07000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
payment address

Month/Year Claimed	Adjustment Number	Date Received	MIR Date	Date Accepted	Date Processed	Reason Code
Jul 2013	0					
<b>Voucher #</b>						

Actions	Center #	Center Name	Type	Errors	Status
View   Modify	0001	Learning CIPS Main St.	CC		Validated

- If the claim figures do not pass, the status will show an **ERROR** and the claim cannot be submitted for payment.

Month/Year Claimed	Adjustment Number	Date Received	MIR Date	Date Accepted	Date Processed	Reason Code
May 2011	0					
<b>Voucher #</b>						

Actions	Center #	Center Name	Type	Errors	Status
View <input style="border: 2px solid red;" type="button" value=" Modify"/>	0001	Learning CIPS #1	CC	3	Error
Add	0002	Learning CIPS #2	SAJAR		

This claim has 3 errors. Click MODIFY to see the errors and correct them.

This is an example of error messages that might appear when the claim cannot be validated. Click **MODIFY** and check to see if there was a data entry error. If the capacity of the Center has been amended or if the days/hours/meals served have changed, contact the Administrative Representative.

Code	Error Description
323454	Total child care lunches is not correct. It may be that the attendance or enrollment is incorrect.
323455	Total Child Care Lunch cannot be greater than 'Total Attendance'.

### Claim Settings

Each Center has its own claim settings determined in the Center Application. These include the months open, days open, meals approved and the type of center it is. If data is entered that exceeds what is currently approved, an error will result.

Claim Month- Centers can only be claimed for the months in which they are approved for.

Attendance Reporting- Maximum number of days will be determined by the weekdays the Center is approved for.

Number of Enrolled Participants in each reimbursement category- Head Start Centers, At-Risk Only Centers and Emergency Shelters do not report free/reduced/paid figures. These fields will not show up.

Child Meals/ Snacks Served- These fields are made available based on the current meal approvals in the Center Application.

\*\*At-Risk programs- most are only eligible to claim during the school year of September through June. Check with the Claim or Administrative Representative if there are any questions about how to claim school age children in July and August.

### **What happens after CONTINUE is clicked?**

The Claim Month Details screen appears with a breakdown of claim date. On this screen, users will **Certify** and **Submit** the claim.

**Failure to certify and submit the claim as described can result in loss of payment! A claim is not submitted until this process is complete. It is possible to miss the submission deadline by neglecting this step!**

9. Read the **Certification**, then check the box. If the user forgets to check the certification, an error will appear. The claim cannot be submitted until the certification is checked.

10. click on the red **“SUBMIT FOR PAYMENT”** button.

**Child & Adult Care Centers  
Claim Month Details for July 2013**

07000 (C)  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
payment address

Month/Year Claimed	Adjustment Number	Date Received	MIR Date	Date Accepted	Date Processed	Reason Code
Jul 2013	0					
<b>Voucher #</b>						

**Child Care Center**

Meals / Snacks Served	Free (A)	Reduced (B)	Paid (C)	Total (A + B + C)
C1. Breakfast:	52	35	88	175
C2. AM Snack:	0	0	0	0
C3. Lunch:	57	38	98	193
C4. PM Snack:	51	34	85	170
C5. Supper:	0	0	0	0
C6. Night Snack:	0	0	0	0

**Certification**

I certify, to the best of my knowledge and belief, that this claim is true and correct in all respects; that records are available to support this claim; that it is in accordance with the terms and conditions of existing agreements; and that payment therefore has not been received. I recognize that I will be fully responsible for any excess amount that may result from erroneous or neglectful reporting herein. Also, I am aware that deliberate misrepresentation or withholding of information may result in prosecution under applicable state and federal laws.

< Back
Submit For Payment

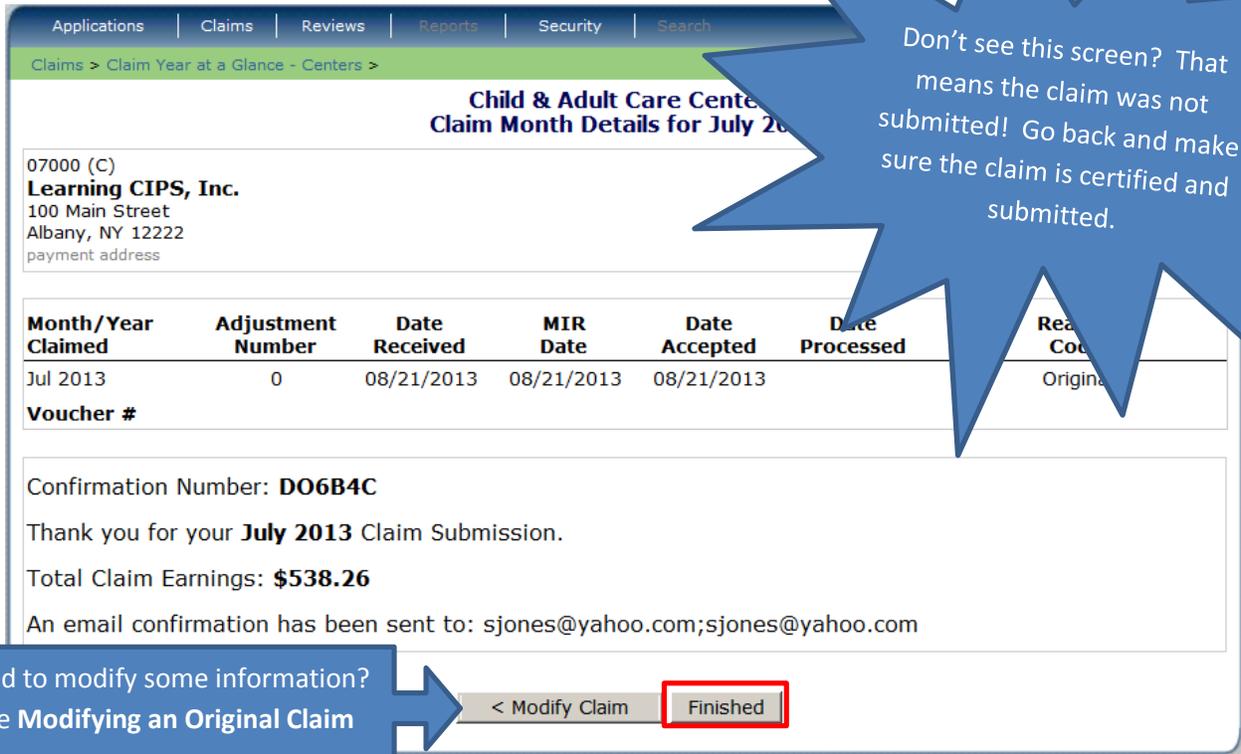
**#1 Read and click the Certification!**

**#2 Click Submit for Payment!**

Once the claim has been successfully submitted, the screen will show a confirmation which includes the following information:

- A Confirmation Number.
- Confirmation of the Month claimed.
- The total claim earning. Be aware that this does not reflect any adjustments, such as advance payments. The actual payment may be different.
- Notice of where the confirmation message is sent. This message is sent to the Sponsor Administrator and the person who submitted the claim.

11. Click **FINISHED**



Applications | Claims | Reviews | Reports | Security | Search

Claims > Claim Year at a Glance - Centers >

**Child & Adult Care Center  
Claim Month Details for July 2013**

07000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
payment address

Month/Year Claimed	Adjustment Number	Date Received	MIR Date	Date Accepted	Date Processed	Receipt Code
Jul 2013	0	08/21/2013	08/21/2013	08/21/2013		Original

**Voucher #**

Confirmation Number: **DO6B4C**  
 Thank you for your **July 2013** Claim Submission.  
 Total Claim Earnings: **\$538.26**  
 An email confirmation has been sent to: sjones@yahoo.com;sjones@yahoo.com

Need to modify some information?  
See **Modifying an Original Claim**

< Modify Claim **Finished**

The claim record will now contain much of the following detail:

**Month/Year Claimed**- month and year of that claim.

**Adjustment Number**- number of times the claim has been revised.

**Date Received**- date the sponsor began work on the claim.

**MIR (Merchandise/Invoice Received) Date**- date the claim is payable.

**Date Accepted**- date the claim was submitted to CACFP by the Sponsor.

**Date Processed**- date CACFP sent the claim for payment.

**Reason Code**- Indicates the type of claim. Original and adjusted are most common. May also see review or one time only

After clicking “Finished” the Claim Month Details screen will contain an Earned Amount and Status. See below for definitions of these terms.

Child & Adult Care Centers Claim Month Details for July 2013						
07000 (C) <b>Learning CIPS, Inc.</b> 100 Main Street Albany, NY 12222 payment address						
<b>Claim Month: July 2013</b>						
Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
<a href="#">View</a>   <a href="#">Modify</a>   <a href="#">Summary</a>	0	08/21/2013	08/21/2013		\$538.26	Accepted
<b>Total Earned</b>					\$538.26	
<a href="#">&lt; Back</a>						

After the claim has been submitted for payment to the Office of the State Comptroller, the Claim Month Details will contain the **Date Processed**.

Child & Adult Care Centers Claim Month Details for May 2011						
05830 (C) <b>Learning CIPS</b> 100 Training Lane Albany, NY 12205 payment address						
<b>Claim Month: May 2011</b>						
Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
<a href="#">View</a>   <a href="#">Summary</a>	0	06/06/2011	06/06/2011	06/06/2011	\$3,765.71	Processed

The following columns will appear:

**Earned Amount**- this is the dollar amount of the claim as submitted.

**Status**- the status of the claim

**Error**- there is a problem with the claim data. Click MODIFY, read the error messages, make corrections and follow steps 7- 11.

**Pending**- you have not submitted the claim.

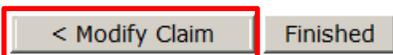
**Accepted**- the claim has been submitted to CACFP. Make sure the claim has a status of Accepted.

**Processed**- the claim has been submitted to Office of the State Comptroller for payment. Your organization should receive payment within two weeks.

### Modifying an Original Claim

Before an original claim is processed, users can make changes to all fields in the Center Claim Report for any center necessary. Modifications will change the amount of the payment. There are two places to do this:

The Claim Month Details screen where you see the following options:



The Claim Month Details screen (after you click FINISH above) where you see the following options:

Modify a claim when there is no Date Processed.

Claim Month: July 2013							
Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status	
View <span style="border: 1px solid red; padding: 2px;">Modify</span> Summary	0	08/21/2013	08/21/2013		\$538.26	Accepted	

Modify the claim by selecting the Center requiring change. Re-enter claim information and **SAVE-CONTINUE-CLICK THE CERTIFICATION-SUBMIT FOR PAYMENT-FINISH**

After submitting the claim, do not click on “MODIFY” unless you intend to change the claim and resubmit it.

If you accidentally click on “MODIFY” you MUST click on Certify and Submit for Payment a second time.

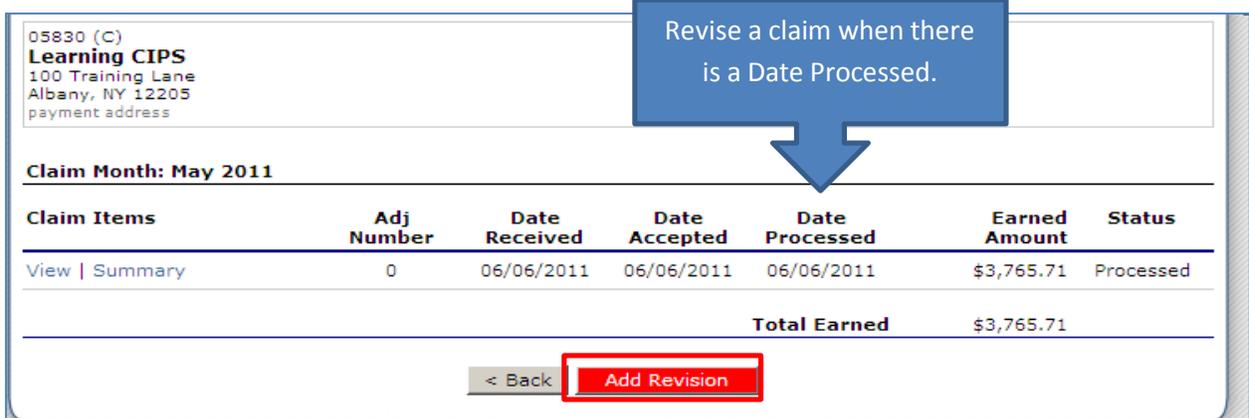
If you do complete a modification, you MUST Certify and Submit for Payment a second time.

### **Creating an Adjusted Claim (Add Revision)**

After a claim has a Date Processed, the user will not have the option to modify the claim. The user will have to revise a claim, also called creating an adjusted claim. Because the payment has already been sent, creating an adjusted claim results in the receipt of a 2<sup>nd</sup> check if adjusting upward, or the next claim payment being lowered if adjusting downward.

#### **ALWAYS CHECK THE PROGRAM YEAR AND THE MONTH BEING SELECTED BEFORE INITIATING AN ADJUSTED CLAIM**

1. Click **ADD REVISION** to initiate an adjusted claim.



05830 (C)  
**Learning CIPS**  
100 Training Lane  
Albany, NY 12205  
payment address

**Claim Month: May 2011**

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
<a href="#">View</a>   <a href="#">Summary</a>	0	06/06/2011	06/06/2011	06/06/2011	\$3,765.71	Processed
<b>Total Earned</b>					\$3,765.71	

< Back **Add Revision**

Revise a claim when there is a Date Processed.

- The Center List for that month will open. Click **REVISE** on the Center(s) requiring changes.

05830 (C)  
**Learning CIPS**  
 100 Training Lane  
 Albany, NY 12205  
 payment address

Month/Year Claimed	Adjustment Number	Date Received	MIR Date	Date Accepted	Date Processed	Reason Code
May 2011	1		06/06/2011			

Voucher #

Internal Use Only

Actions	Center #	Center Name	Type	Errors	Status
View <span style="border: 2px solid red; padding: 2px;">Revise</span>	0001	Learning CIPS #1	CC		Paid
View <span style="border: 2px solid red; padding: 2px;">Revise</span>	0002	Learning CIPS #2	SAJAR		Paid

- The Center Claim Report will open for the Center you choose to revise. Make all required changes. ***When making the corrections, complete all fields as they should have been originally.*** Do not use + or – signs in any field.
- SAVE-CONTINUE-CLICK THE CERTIFICATION-SUBMIT FOR PAYMENT-FINISH**

## The Claim Summary

To view the Claim Summary screen:

- Select **Claims** from the **Dark Blue** CIPS Menu Bar
- Select **Claim Entry- Centers**
- Select the Month you wish to view
- Select **SUMMARY** on the Claim Month Details

07000 (C)  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
 payment address

**Claim Month: July 2013**

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View   Modify <span style="border: 2px solid red; padding: 2px;">Summary</span>	0	08/21/2013	08/21/2013		\$538.26	Accepted
<b>Total Earned</b>					\$538.26	

This opens the Claim for Reimbursement Summary. This summary shows meal and reimbursement amount by Center type as submitted.

- At the bottom of the screen, click **SHOW SITE MEAL DETAILS**. Meals claimed as shown by Center.

Warrant #	Warrant Date	Warrant Amount
Warrant information is unavailable at this time.		
<input type="button" value="Show Site Meal Details"/>		

Center Meal Totals				
Learning CIPS #1 0001				
Meal Type	Free	Reduced	Paid	Total
Breakfast	200	250	152	602
Lunch	199	249	151	599
PM Snack	200	250	151	601
Learning CIPS #2 0002				
Meal Type	Free	Reduced	Paid	Total
AM Snack	156	89	0	245
Lunch	65	37	0	102
PM Snack	156	89	0	245
Supper	265	0	0	265

You can print the claim here by clicking on the Print button on the HCS screen.

## The Payment Summary

A Payment Summary is available only after CACFP has processed a claim. The Payment Summary List displays the following items:

**Processed Date**- Date the claim was processed by CACFP.

**Earned Amount**- Amount of the claim as submitted.

**Adjustments**- Any changes to the claim due to advance payments or recovery of funds.

**Distribution Amount**- Final amount to be paid to the Sponsor.

Schedule Number	Processed Date	Warrant Issue Date	Earned Amount	Adjustments	Distribution Amount
1260232	09/03/2013		\$ 1,068.27	\$ 0.00	\$ 1,068.27
1260213	08/05/2013		\$ 995.04	\$ 0.00	\$ 995.04

Click any item in the list to see the Payment Summary. The details of each payment processed appear as seen below:

Schedule Number	Schedule Process Date	Federal Year	Warrant Number	Paid Date
1260213	08/05/2013	2012-2013	01651966	
<b>Invoice #:</b> CACFP-2021-13-07-0-C		<b>Voucher #:</b> 355522		
Account Description	Month	Transaction Description	Amount	
CACFP Meals				
	Jul 2013	Original Claim	\$ 890.88	
	Jul 2013	Distribution for Claim #202084	\$ 890.88	
CACFP Cash In Lieu				
	Jul 2013	Original Claim	\$ 104.16	
	Jul 2013	Distribution for Claim #202084	\$ 104.16	
<b>Payment Schedule Summary</b>				
	Jul 2013	CACFP Meals	\$ 890.88	
	Jul 2013	CACFP Cash In Lieu	\$ 104.16	
<b>Total Payments</b>			<b>\$ 995.04</b>	

# Chapter 4- Reviews

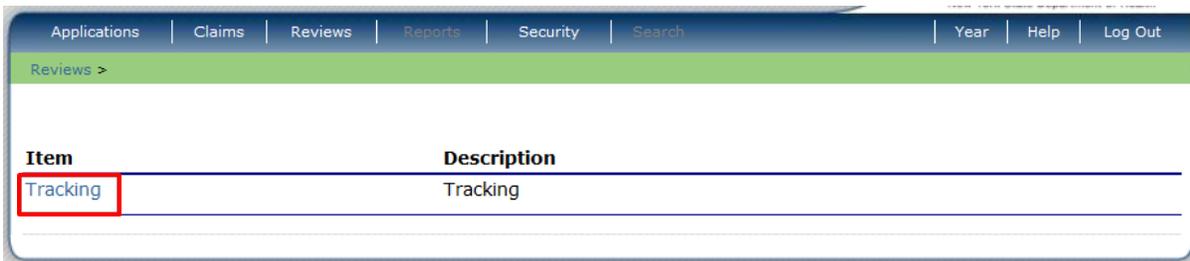
## Respond to Review Findings

Respond to administrative reviews in the REVIEWS section of CIPS.

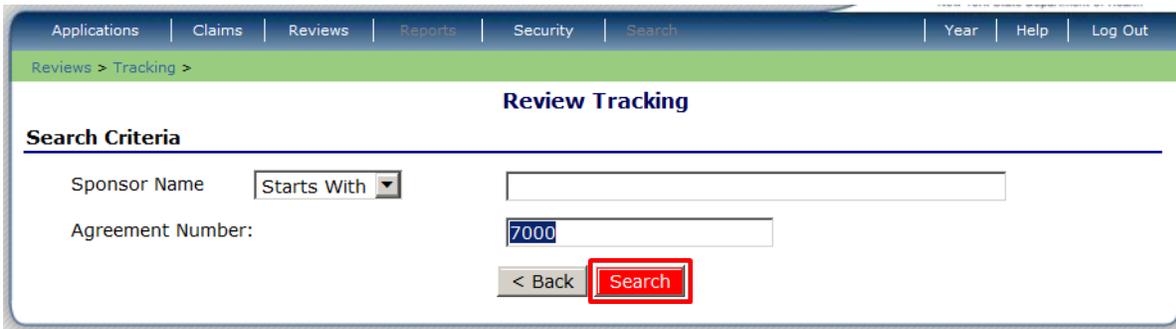
1. Click **REVIEWS** in the CIPS Menu Bar.



2. Click **TRACKING** in light blue.



3. Enter the Sponsor agreement number. Then click **SEARCH**.



4. Click on the **OPEN** review.

Agreement Number	Sponsor	Due By Date	Review Form	Purpose	Review Status	Scheduled Date	CAP Approval Date	T O S D C
07000	Learning CIPS, Inc.	06/30/2016	Independent Center Review - WS2001 -v2	3 Year	Open	08/15/2013		4 4 0 0 0

Found: 1

To Bottom

To Top

The current review will have a status of "Open". Previous reviews will be "Closed". Users can view closed reviews.

5. The findings and recommendations are listed for the current review. Click **VIEW** to see detail for all Closed findings or recommendations, click **EDIT** to enter the corrective action plan.

4.	View Edit	Finding: Income eligibility applications are not kept confidential. [Regulation 226.23 (e) (1)]	Action Required	Open
----	-----------	---	-----------------	------

Respond to all open findings.

6. When Edit is clicked, the user can see all detail of the finding, the required action and the due date. Special instructions will list supporting documents or other materials the reviewer has required to support the corrective action plan. Click **SUBMIT FOR APPROVAL** when the response is complete.

- The user may also SAVE if the response is incomplete or click BACK to return to the listing of findings /recommendations if no response is typed.

Finding: **Finding: Income eligibility applications are not kept confidential. [Regulation 226.23 (e) (1)]**

Finding Cited:

Required Corrective Action: Describe how income applications will be kept confidential and access to the forms will be limited to those who categorize them and prepare or submit the monthly claim for reimbursement.

Sponsor Corrective Action Plan:

Type in this box.

Special Instructions:

---

**Finding Tracking**

1. Current Status:	Open
2. Severity:	Action Required
3. Due Date:	8/15/2101
4. CACFP Response:	

---

**Dates**

Created	08/15/2013 by JLG11
Submitted for Acceptance	
Accepted	

  
**SUBMIT FOR ACCEPTANCE**  
 when the response is complete.

7. Click **FINISH** when prompted to return to the list of findings/recommendations.

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Reviews > Tracking >

**Confirmation**

07000 (C)  
**Learning CIPS, Inc.**  
 100 Main St.  
 Albany, NY 12222  
 ALBANY

**The Review has been saved.**

**Review Findings (Corrective Action Plans)**

**Case Number: 4433**

**Sponsor**

Action	Findings/Recommendations	Severity	Status	Due Date
1. <a href="#">View</a>	A Participant Data Form was not on file for each center; however it was completed on the day of the review.	No Action Required	Closed	08/15/2101
2. <a href="#">View</a>	Finding: The income eligibility applications did not support the number of participants reported in the free, reduced and paid categories on the claim. [Regulation 226.23 (e) (4)]	Action Required	Submitted	08/15/2101

When the corrective action plan has been submitted, the status changes to submitted.

CACFP staff will evaluate the response and supporting documentation, if required, and either approve or not approve. Responses that have been approved will have a status of “Closed”; those that were not approved will have a status of “Not Approved”.

2. <a href="#">View</a>	Finding: The income eligibility applications did not support the number of participants reported in the free, reduced and paid categories on the claim. [Regulation 226.23 (e) (4)]	Action Required	Closed	08/15/2101
3. <a href="#">View</a> <a href="#">Edit</a>	Finding: Vendor contracts are not on file for all vended meals. [Regulation 226.22 and FNS 796-2, Exhibit B (D. 1a.)]	Action Required	Not Approved	09/15/2101

Respond to all Not Approved findings.

## Respond to Corrective Actions Plans- Not Approved

If a corrective action plan is not approved, a new Due Date will be assigned and the user will follow steps to edit their previous response. The CACFP response will be available at this time. Users will delete their old plan and type in a new one. Then submit for approval again.

Case Number: 1100

Finding:	<b>Finding: Vendor contracts are not on file for all vended meals. [Regulation 226.22 and FNS 796-2, Exhibit B (D. 1a.)]</b>
Finding Cited:	The vendor contract has not been approved because the vendor menu daily did not meet meal pattern requirements. In a letter dated 7/1/13, CACFP informed Ms. Poppins of specific areas that required revision to bring the menu into compliance with the CACFP Healthy Meal Pattern.
Required Corrective Action:	The vendor menu must be revised to meet themeal pattern as advised. Meals that do not meet the CACFP Healthy Child Meal Pattern cannot be claimed for reimbursement, effective immediately.
Sponsor Corrective Action Plan:	Delete old corrective action plan, type in a new plan.
Special Instructions:	To confirm that the Corrective Action Plan has been put in place, submit the revised vendor menu.

---

**Finding Tracking**

1. Current Status:	Not Approved
2. Severity:	Action Required
3. Due Date:	9/15/2101
4. CACFP Response:	The corrective action plan for this finding is not approved. The revised menu did not meet the meal pattern after revision. The contrac cannot be approved until the menu is approved. You will be invited to training.

Read CACFP Response and note the new Due Date.

---

**Dates**

Created	08/15/2013 by JLG11	
Submitted for Acceptance	Submit when complete	
Accepted		

Save
Submit For Acceptance
Back

# Chapter 5- Renewals

Each year, Sponsoring organizations in the Child and Adult Care Food Program are required to renew their agreement with CACFP. By renewing, Sponsors can continue to submit claims and receive reimbursement. Claims, beginning with October of the new program year, cannot be paid until CACFP receives and approves all renewal documentation.

Sponsors whose renewal is not approved by November 30, are not be eligible for October reimbursement.

## New Program Year- Enrollment and Certification Statement

Every Sponsoring organization must enroll for the new Program Year by September 30<sup>th</sup>. When the new Program Year is available, users will see it when they open the Applications Menu. Enrollment begins when the user clicks the new program year. See below:



**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications >

### Select Program Year

7000 (C)  
**Learning CIPS, Inc.**  
No address on file for this year

Currently, there are 3 Program Year(s) available. Select the year you wish to access.

Program Year	Date Range	Application Packet
<b>NEW</b> 2013 - 2014	10/01/2013 - 09/30/2014	Not Started
2012 - 2013	10/01/2012 - 09/30/2013	Application Packet on File
2011 - 2012	10/01/2011 - 09/30/2012	Not Started

< Back



**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Application Packet - Center Sponsor > Program Year: 2013 - 2014

### Application Packet Center Sponsor

7000 (C)  
**Learning CIPS, Inc.**  
No address on file for this year

Packet Submitted Date:  
Packet Approved Date:  
Packet Original Approval Date:

**The Sponsor has not started in the current year (2014).**

Click 'Enroll' to enroll for this year based on your prior year's information.

**Enroll** Cancel

By clicking the new program year, users will be prompted to enroll. Click **ENROLL**. Then **OK** to continue.

The Application Packet- Center Sponsor will then open. Notice the Sponsor Application requires validation. Click **MODIFY**.



**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Application Packet - Center Sponsor > Program Year: 2013 - 2014

**Application Packet Center Sponsor**

7000 (C)  
**Learning CIPS, Inc.**  
 No address on file for this year

Packet Submitted Date:  
 Packet Approved Date:  
 Packet Original Approval Date:

Action	Form Name	Latest Version	Status
View <b>Modify</b>	➔ Sponsor Application	Original	<b>Pending Validation</b>
View   Revise	✓ Board of Directors Board Member List	Original	Approved
View   Revise	✓ Sponsor Budget	Original	Approved
Details	Checklist Summary		

	Approved	Pending	Return for Correction	Denied	Withdrawn/ Closed	Error	Total Applications
Center Application(s)	1	0	0	0	0	0	1

Next Base Year Renewal: 2015 - 2016

< Back **Submit for Approval** Withdraw Packet

All CACFP Sponsorships must renew their participation annually. Instructions are emailed to the Sponsor Administrator. This person is listed in the Contacts section of the Sponsor Application. Always keep the contact information updated.



**Certification Statement**

The Sponsor agrees to:

Click the box after reading the Certification Statement

I CERTIFY THAT:

- The names, current mailing addresses and dates of birth of the owner, Chair of the Board of Directors and executive director have been submitted to the State.
- The Sponsor and its principals have not been determined ineligible to participate in any publicly-funded program for violating the program's requirements, in the past seven years.
- None of the Sponsor's principals has been convicted of any activity that indicated a lack of business integrity, in the past seven years.
- None of the following are currently on the CACFP National Disqualified List:
  - our organization
  - our organization's principals
  - our centers
  - our centers' principals
- The Sponsor is currently compliant with the required performance standards of financial viability and management, administrative capability and program accountability as described in 7 CFR226(b)(2)(vii).
- The Sponsor will provide CACFP with immediate notification of any change in the program or application, including but not limited to: change in owner, FEIN, administrator, license, approval status or any lawsuit alleging civil rights violations filed against our organization or any of its facilities.
- All of the information contained in this application package and certification is true and correct.

Created By: mpoppins on: 7/18/2013 8:46:11 AM

Click Save **Save** Cancel

Show Changes  
 VIEW | **MODIFY**

Once the Sponsor Application for the new fiscal year opens, users should verify all information is correct and up to date. Pay close attention to the contact information- add new staff, delete staff no longer employed or if responsibilities have changed. The user should read the Certification Statement in full, put a check mark in the box, then click **SAVE**. Users will then be prompted to click **FINISH**. If the box is not checked, an error message will appear. The application cannot be submitted or approved until the box is

checked.

### **Board of Directors Board Member List**

All Sponsors must review the Board of Directors Board Member List for accuracy when renewing.

Sponsors can view, modify, add and delete board members. Always begin by viewing the information to determine if changes are needed.

1. From the Application Packet- Center Sponsor screen, click **VIEW** to see the Member List.

Action	Form Name	Latest Version	Status
View   Revise	✔ Sponsor Application	Original	Approved
View	✔ Financial Information		Approved
View	✔ Non-Discrimination Policies		Approved
View   Revise	✔ Board of Directors Board Member List	Original	Approved

07000 (C)  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
 ALBANY

Version: Rev. 1

Action	Name	Board Position	Phone
View   Modify	Florence Nightingale Sunshine Parkway Albany, NY 12222	Chairman of the Board	(518) 999-9999
DOB: 05/05/1950		<b>VIEW mode</b>	

Created By: mpoppins on: 8/12/2013 11:22:46 AM    Modified By: mpoppins on: 8/12/2013 11:31:38 AM

[< Back](#)

2. Click **VIEW** on the individual to open details of the board member.

3. If changes are required, click **BACK** to see the Application Packet.

4. Click **REVISE**. The Member List will open, it will look similar to when clicking view, but now the option to modify and add a member will be available.

07000 (C)  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
 ALBANY

Version: Rev. 1

Action	Name	Board Position	Phone
View <b>Modify</b>	Florence Nightingale Sunshine Parkway Albany, NY 12222	Chairman of the Board	(518) 999-9999
DOB: 05/05/1950		<b>REVISE mode</b>	

Created By: mpoppins on: 8/12/2013 11:22:46 AM    Modified By: mpoppins on: 8/12/2013 11:31:38 AM

[< Back](#)    [Add Member](#)

5. Clicking **MODIFY**- the details of the member will open and all fields can be edited.

Make changes if a member's information has changed, then click **SAVE**.

Clicking **ADD MEMBER** will open a blank page for board member information. Owners of for profit organizations should be listed as the Chairman of the Board. Complete all fields seen below and save.

If a person is no longer a board member, executive director or owner they can be deleted by:

- Clicking **MODIFY** then next to their name.
- Then click **DELETE** in the lower right hand corner.

**Board Member Information**

1. Board Member type:

2. Length of time on board:

3. Name: Salutation:  First Name:  Last Name:

4. Date of Birth:  (mm/dd/yyyy)

5. Email Address:

6. Phone:  Ext:  Fax:

7. Occupation:

8. Current employer:

**Employer Address**

9. Address 1:

10. Address 2:

11. City:

12. State:  Zip:

**Home Address**

13. Address 1:

14. Address 2:

15. City:

16. State:  Zip:

17. Is this member related to other board members or staff of this organization?  Yes  No

If **Yes**, please specify name and position held:

Created By: SMB05 on: 8/8/2013 10:40:48 AM Modified By: SMB05 on: 8/8/2013 10:42:54 AM

VIEW |

17. Is this member related to other board members or staff of this organization?  Yes  No

If **Yes**, please specify name and position held:

Created By: SMB05 on: 8/8/2013 10:40:48 AM Modified By: SMB05 on: 8/8/2013 10:42:54 AM

**Press the 'Delete' button to delete the board member and any related items. (This cannot be un-done.)**

Clicking **DELETE** will prompt the user with a warning that pressing delete cannot be un-done.

## CACFP Budget Plan

Some Sponsoring Organizations are required to submit an annual CACFP Budget Plan for the program renewal. Sponsors are notified if the budget is needed. **Do not make changes to the budget unless specifically advised to do so.**

An email is sent to the Sponsor Administrator advising that a budget is required for the Program Renewal. Instructions and forms will be attached to the email. It is recommended that the person who receives this information save the files on their own computer because they will need to edit the files and upload them into CIPS.

When the user opens the new Program Year, the Sponsor Application and Sponsor Budget will have a red arrow → indicating those forms must be completed. Follow the instructions in Chapter 1 to complete the Sponsor Application.

### **To access the Sponsor Budget:**

From the Application Packet-Center Sponsor, locate the Sponsor Budget- click **ADD**.

The budget will open and be blank. Users can look at the budget from last year by changing the Program Year and viewing the Sponsor Budget.

### Completing a Sponsor Budget for Program Renewal

When the Sponsor has determined the estimated reimbursement and annual budget, the information is entered into the CIPS Sponsor Budget.

If CACFP funding is requested for labor, capital outlay, audit fees, contract services or other administrative costs, a spreadsheet and supporting documentation will be required. The spreadsheet and other necessary forms are emailed to the Sponsor Administrator.

The budget entered into CIPS should be exactly the same as the worksheet attachment.

Upload the budget worksheet and any additional documents required for review and approval of the budget.

### Why Add an Attachment?

If funding is requested to be used for labor costs, capital outlay, audit fees, contract services or other administrative costs, the Centers Budget Excel spreadsheet must be attached to detail the costs and request special approvals for specific items.

	Sponsor Complete This Column	FOR ST	
<b>A. ANTICIPATED ANNUAL CACFP REIMBURSEMENT</b>			
1. Anticipated Annual CACFP Reimbursement	\$ 50,000.00		
<b>B. OPERATING EXPENSES</b>			
1. Total Food Expenses	\$ 45,000.00		
2. Non-Food Supplies			
Paper goods	\$ 5,000.00	\$ 5,000.00	
Food service related equipment under \$5,000	\$ 0.00	\$ 0.00	
Maintenance supplies	\$ 0.00	\$ 0.00	
Uniform allowance	\$ 0.00	\$ 0.00	
<b>Total Non-Food Supplies</b>	<b>\$5,000.00</b>	<b>\$5,000.00</b>	
3. Food Service Personnel			
Salaries	\$ 0.00	\$ 0.00	
F I C A	\$ 0.00	\$ 0.00	
<b>Total Food Service Personnel</b>	<b>\$0.00</b>	<b>\$0.00</b>	
4. Capital Outlay [Food service related equipment over \$5,000]	\$ 0.00	\$ 0.00	
List items to be purchased	<input type="text"/>		
<b>Total Operating Expenses</b>	<b>\$50,000.00</b>	<b>\$50,000.00</b>	
<b>C. NET OPERATING</b>			
1. The Difference (A-B=C) (If zero or less, stop here)	\$ 0.00	\$ 0.00	
<b>D. ADMINISTRATIVE EXPENSES</b>			
1. Administrative Personnel			
Salaries	\$ 0.00	\$ 0.00	
F I C A	\$ 0.00	\$ 0.00	
Fringe	\$ 0.00	\$ 0.00	
<b>Total Administrative Personnel</b>	<b>\$0.00</b>	<b>\$0.00</b>	
2. Administrative Costs			
Office supplies, postage, printing	\$ 0.00	\$ 0.00	
Nutrition education and training supplies	\$ 0.00	\$ 0.00	
Fringe for food service personnel	\$ 0.00	\$ 0.00	
Mileage or public transportation costs	\$ 0.00	\$ 0.00	
Contract services (bookkeeping/payroll)	\$ 0.00	\$ 0.00	
Audit Fees	\$ 0.00	\$ 0.00	
Other	\$ 0.00	\$ 0.00	
<b>E. TOTAL</b>		\$0.00	
[May not be used]		\$0.00	
<b>Document Attachments</b>			
Actions	Notes	Budget Version	Uploaded By
Add an attachment			
Created By: mspolina on: 7/18/2013 10:43 AM			
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Sponsors will enter their budget figures in this column.

Before adding an attachment, CLOSE THE FILE ON YOUR DESKTOP. Attempting to upload or attach an open file will result in an error and the file will not attach.

How to Upload/Attach Files in the Sponsor Budget  
Steps 1-7

1- Click Add an attachment

### Child and Adult Care Food Program



Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Application Packet - Center Sponsor > Program Year: 2013 - 2014

#### Child & Adult Care Centers Sponsor Budget Document Upload for 2013 - 2014

7000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
ALBANY

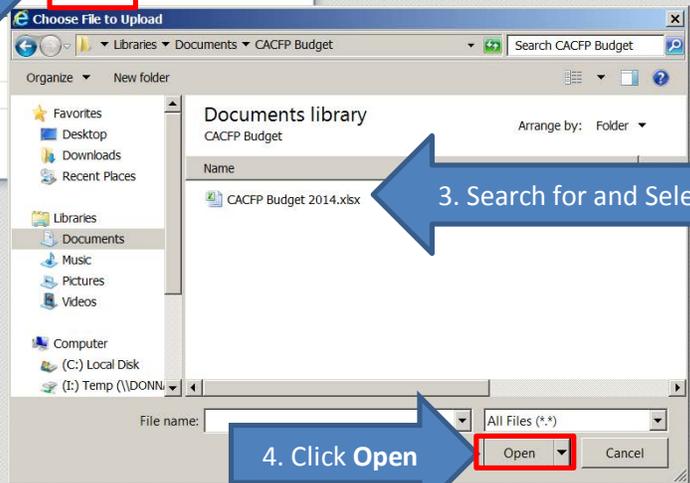
Budget Version: Revision 1

#### Document

- 1. Select File:
- 2. File Note: (1000 character max)

2. Click Browse

Browse...



3. Search for and Select File

4. Click Open

Open

Upload and Save

Cancel

Application

7000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
ALBANY

Budget Version: Revision 1

#### Document

- 1. Select File: C:\Users\jlg11\Documents\CACFP Budget\CACFP Budget 2014.xlsx
- 2. File Note: (1000 character max) 2014 budget for approval

5. Enter File Note to identify the attachment. A file note is required in order to save.

6. Click Upload and Save

Upload and Save

Cancel

### Child and Adult Care Food Program



Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Applications > Application Packet - Center Sponsor > Program Year: 2013 - 2014

#### Child & Adult Care Centers Sponsor Budget Document Upload for 2013 - 2014

7000 (C)  
**Learning CIPS, Inc.**  
100 Main Street  
Albany, NY 12222  
ALBANY

The Budget File Upload has been processed.

< Edit

7. Click Finish

When the file has been uploaded click **SAVE**.

**Total Administrative Costs** \$0.00  
**E. TOTAL ADMINISTRATIVE EXPENSES**  
 [May not exceed 15% of A.] (\$7,500.00) \$0.00

**Document Attachments**

Actions	Notes	Budget Version	Uploaded By
View File   Modify	2014 budget for approval	Rev. 1	mpoppins 07/18/2013

Add an attachment  
 Created By: mpoppins on: 7/18/2013 9:53:43 AM Modified By: mpoppins on: 7/18/2013 12:05:22 PM

VIEW | MODIFY

See who uploaded the file and the date it was done here.

View File will open the attachment.

Modify will allow the File Note to be edited, not the attachment.

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out  
 Applications > Application Packet - Center Sponsor > Program Year: 2012 - 2013

**Application Packet  
Center Sponsor**

07000 (C)  
**Learning CIPS, Inc.**  
 100 Main Street  
 Albany, NY 12222  
 ALBANY

Packet Submitted Date:  
 Packet Approved Date:  
 Packet Original Approval Date: 08/08/2013

Action	Form Name	Latest Version	Status
View   Modify	✓ Sponsor Application	Rev. 1	Not Submitted
View	✓ Financial Information		Approved
View	✓ Non-Discrimination		Approved
View   Revise	✓ Board of Directors		Approved
View   Revise	✓ Sponsor Budget		Approved
Details	Checklist Summary		

	Approved	Pending	Retu Corre	Denie	Withdrawn/ Closed	Error	Total Applications
Center Application(s)	1	0		0	0	0	1

Next Base Year Renewal: 2015 - 2016

Always remember to click  
\*SUBMIT FOR APPROVAL\*  
CACFP cannot approve any  
changes until the packet is  
submitted.

## **Security**

All Sponsors must regularly review and update the Security User's Profile for all staff with access to CIPS. Refer to Chapter 6 for details on how to access the list of users and add, delete or modify the profile and individual security rights. Also consider requesting HCS accounts for all staff listed as a Sponsor Contact in the Sponsor Application section.

# Chapter 6- CIPS Security

## Security Starts with You

New York State takes the security of information seriously. Sharing account information can put your organization at risk. At a minimum HCS can suspend or disable an account. Because claim settings are changed online, sharing accounts could affect the ability to claim and the amount of reimbursement received. Follow these guidelines to make sure CACFP tasks and claims can be performed regardless of turnover:

- Arrange to have more than one person obtain an HCS Account and access to CIPS.
- Replace the HCS Director/HCS Coordinator before exiting the organization.
- Immediately inactivate employee accounts when they leave their job or duties change.
- Immediately add users when new staff are hired or duties change.
- Update security rights as needed, at any time.

**Never share a personal user id or password with anyone!!**

## Adding a Staff Person to CIPS

Adding CIPS Certified staff is a two-step process:

### **Step 1- Request HCS account**

1. Login to HCS
2. Select **My Content- All Applications**
3. Browse by the letter **“C”**
4. Scroll down and select **“Coord Account Tools – HCS Coordinator”**
5. Scroll down to **Account Requests**

### **Site Policies/Terms of Use**

Violation of the security and use agreement (e.g. sharing your account userid and password with someone else) will result in the temporary suspension of your account privileges until required remedial action is taken by executives at your facility.

**Repeat offenses may result in the permanent removal of the account.**

Contacting the Commerce Accounts Management Unit with someone else's account information will result in the account being disabled due to a security breach.

Access Restricted to HCSCs

**NEW! Paperless HCS User Accounts for non medical professionals OR all those needing access to UAS**

**Important Information!** To enroll using the paperless process, the user must have a valid Photo ID such as a NYS DMV Driver's License, NYS DMV Non-driver Photo ID, Passport, etc. and first register for an account at <https://apps.health.ny.gov/pub/usertop.html>

## PAPERLESS OPTION FOR NEW USERS

- Choose Yes, they have a Valid Photo ID
- If they do not have a NYS Driver's license of Photo ID The user must first register for an account at <https://apps.health.ny.gov/pub/usertop.html>
  - The user must have a VALID photo ID (US Passport, driver's license, unexpired foreign passport)
- You may then add them to your organization
  - You will need the new user's HCS ID and information from their Photo ID

### ACCOUNT REQUESTS

Access Restricted to HCSCs

**\*\*\* IMPORTANT \*\*\*** -- By executing an account request, prospective users of the Health Commerce System are agreeing to abide by the terms of the Security and Use Policy. Account request forms constitute a binding agreement between the NYSDOH and the prospective user, therefore anyone executing an account request should be sure to read and understand terms of these policies before executing the account request.

Request an account for a...	Duties and Responsibilities	Instructions...
<a href="#">Director</a>		<a href="#">Director</a>
<a href="#">Coordinator</a>	<a href="#">Organization Security and Use Policy</a> and <a href="#">User Security and Use Policy</a>	<a href="#">Coordinator</a>
<a href="#">Security Coordinator</a>		<a href="#">Security Coordinator</a>
<a href="#">User</a>	<a href="#">User Security and Use Policy</a>	<a href="#">User</a>
<a href="#">Prescribing Practitioner</a>	<a href="#">Security and Use Policy for Medical Practices</a>	<a href="#">Prescribing Practitioner</a>
<a href="#">Individual Prescribing Practitioner</a>	<a href="#">Individual Prescribing Practitioner Security and Use Policy</a>	<a href="#">Individual Prescribing Practitioner</a>
<a href="#">Individual File Transfer</a>	Organization Security and Use Policy for Public Health Preparedness and Resilience Application (not available when printing the form).	<a href="#">Individual File Transfer</a>

Click to see what information is required to complete the request and mail the form.

Click to print the User Security and Use Policy and Form.

Click to open detailed instructions on how to fill out the User Account Request form

The HCS website offers a variety of ways to receive assistance with the process of adding users. Be sure to take advantage of them as needed:

- Follow the prompts on all screens.
- Refer to the FAQ's- Frequently Asked Questions.
- Call HCS at the numbers provide on screen.
- Email HCS at the email address provided on screen.
- Refer to the Help menu.

Types of HCS Accounts- Which one should I choose for staff?

**Director-** The HCS Director is the person who binds the organization to NYSDOH. HCS recommends a CEO or CFO. They will have coordinator and user rights.

**Coordinator-** The HCS Coordinator maintains the organization’s user accounts and contact information. They are responsible for requesting new accounts and informing NYSDOH when users leave the organization. There may be more than one HCS Coordinator per Sponsorship. CACFP recommends that at least one of them be the organizations Sponsor Administrator.

**User-** Users cannot request new accounts, but can perform all tasks that the HCS Coordinator(s) assign them under security rights.

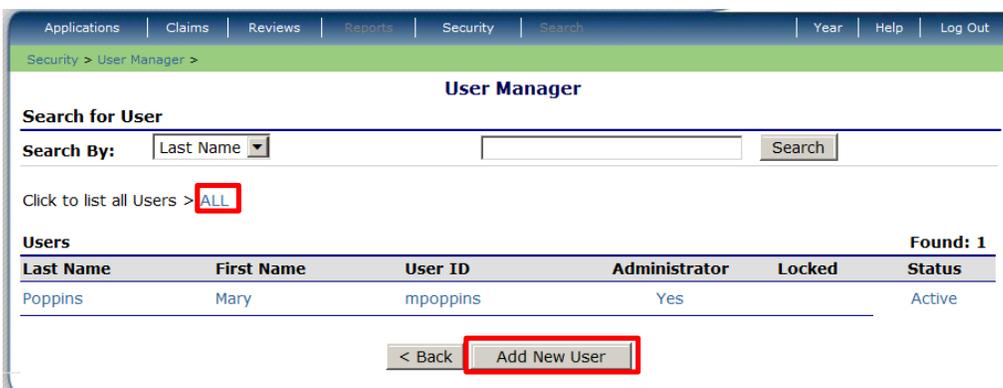
**Step 2- Create the User Profile in CIPS**

After the HCS Account Has Been Activated – the new User will be added to CIPS.

1. In the CIPS Dark Blue Menu Bar, click **SECURITY**
2. Then click **USER MANAGER**



3. Click **ALL** to view the list of current users. The list of current user accounts, both active and inactive, are shown here. Verify the employee is not already listed.



4. If the employee is not on the list, click **ADD NEW USER**. This will open the User Profile where information about the new user is entered.

5. Complete all the fields as follows:

**Child and Adult Care Food Program**

Applications | Claims | Reviews | Reports | Security | Search | Year | Help | Log Out

Security > User Manager > VIEW | MODIFY

### User Profile

**User Information**

First Name:

Middle Initial:

Last Name:

Email Address:

Phone Number (555-555-5555):

**Login Information**

User Name:

Password:

Confirm Password:

Require password change next login:

Single SignOn Name:

**Security Base**

User is an Administrator:  Yes  No

Security Group(s):

- Sponsor Admin Center
- Sponsor Center App L1
- Sponsor Center Claim L1

Associated to Sponsor(s):  Learning CIPS

**Status**

User Status:

**Save** **Cancel**

All User Information must match the HCS Account Request

The User AND Single SignON Name will be the User Id provided by HCS- see the activation letter. Enter password1 for the password. This password will NEVER BE USED.

6. Assign security rights in the **Security Base** section.

**Administrative Rights-** If the employee is to function as an administrator with the ability to add additional users, click “Yes” for the first question. If not, click “No.”

**Security Groups-** should be selected based on the permissions the employee will need to perform their assigned tasks in CIPS. These permissions are as follows:

- Sponsor Center App L1 – This security access has the ability to revise/modify the Sponsor and Center applications and submit the changes for State approval. This security group can be combined with another group(s).
- Sponsor Center Claim L1 – This security access has the ability to revise/modify the monthly claim and submit the claim to the State for payment. This security group can be combined with another group(s).
- Sponsor Admin Center – This security access has the greatest security access available. It includes the same permissions as the two groups listed above plus the security screen permissions to add new users.

Additional guidance for the HCS Coordinator responsible for adding new users:

- If you want a staff person to be able to modify the applications and be able to submit the monthly claims but NOT be able to have access to security, then select Sponsor Center App L1 and Sponsor Center Claim L1 and no other check boxes.
- If you want a staff person to only work on claims, then select Sponsor Center Claim L1 and no other check boxes.
- If you want a staff person to only work on application data updates such as maintaining center applications, then select Sponsor Center App L1 and no other check boxes.

The last selection in the Security Base section is the “Associated to Sponsor(s):” field. CIPS will default to your sponsorship’s name.

7. The “Status” field at the bottom of the page should default to “Active” for a new user account. If not, select “**Active**” when adding a new user.
8. Click **SAVE**

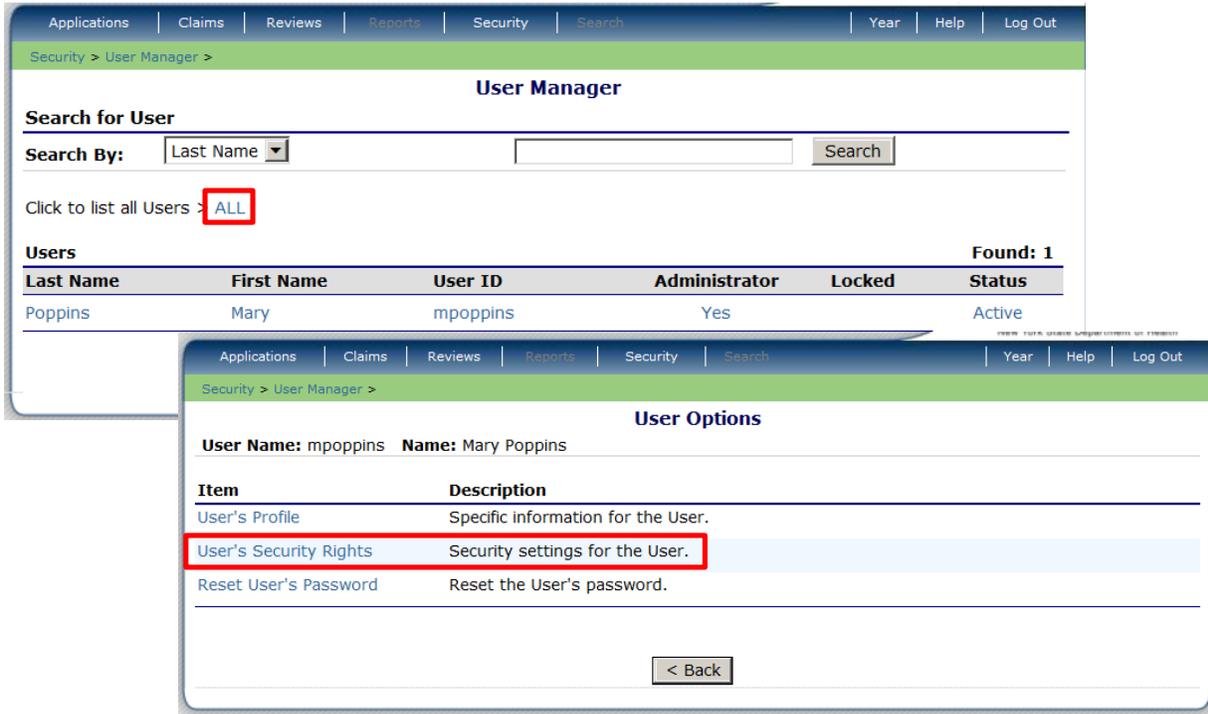
### **Changing Security Permissions for Staff**

A user with administrative rights can customize other users’ rights of the security groups.

1. In the CIPS Dark Blue Menu Bar, click **SECURITY**
2. Then click **USER MANAGER**
3. Click **ALL** to view the list of current users.

- It is possible to search for individuals by entering their name in the search box and clicking **SEARCH**.

4. Click on the users name to open the User Options menu.



The screenshot shows the 'User Manager' interface. At the top, there are navigation tabs: Applications, Claims, Reviews, Reports, Security, Search, Year, Help, and Log Out. Below the tabs, the breadcrumb path is 'Security > User Manager >'. The main heading is 'User Manager'. There is a 'Search for User' section with a dropdown menu set to 'Last Name', an empty search input field, and a 'Search' button. Below this, it says 'Click to list all Users >' with a red box around the word 'ALL'. A table of users is displayed with the following data:

Last Name	First Name	User ID	Administrator	Locked	Status
Poppins	Mary	mpoppins	Yes		Active

Below the table, the 'User Options' menu is shown for user 'mpoppins'. The user's name is 'Mary Poppins'. The menu items are:

Item	Description
User's Profile	Specific information for the User.
User's Security Rights	Security settings for the User.
Reset User's Password	Reset the User's password.

A red box highlights the 'User's Security Rights' item. At the bottom of the menu is a '< Back' button.

5. Click **USER'S SECURITY RIGHTS**.



The screenshot shows the 'User Security Rights' interface for user 'mpoppins' (Mary Poppins). The heading is 'User Security Rights'. Below the heading, it says 'User Name: mpoppins Name: Mary Poppins'. There is a 'Security Rights Setting' section with a table of actions and their status. A blue callout box with a white arrow points to the 'Allow' column of the table. The callout text reads: 'Change the users rights by clicking **ALLOW** or **DENY** for individual actions that can be performed.'

CACFP	Allow	Deny	
	<input type="radio"/>	<input type="radio"/>	CACFP
	<input type="radio"/>	<input type="radio"/>	Applica
	<input type="radio"/>	<input type="radio"/>	Sponsor Profile
	<input type="radio"/>	<input type="radio"/>	Sponsor Manager
	<input type="radio"/>	<input type="radio"/>	Sponsor Profile
	<input type="radio"/>	<input type="radio"/>	Sponsor Profile - View
	<input type="radio"/>	<input type="radio"/>	Center Manager
	<input type="radio"/>	<input type="radio"/>	Center Profile
	<input type="radio"/>	<input type="radio"/>	Center Profile - View
	<input type="radio"/>	<input type="radio"/>	Center Profile - Modify
	<input type="radio"/>	<input type="radio"/>	Add Center

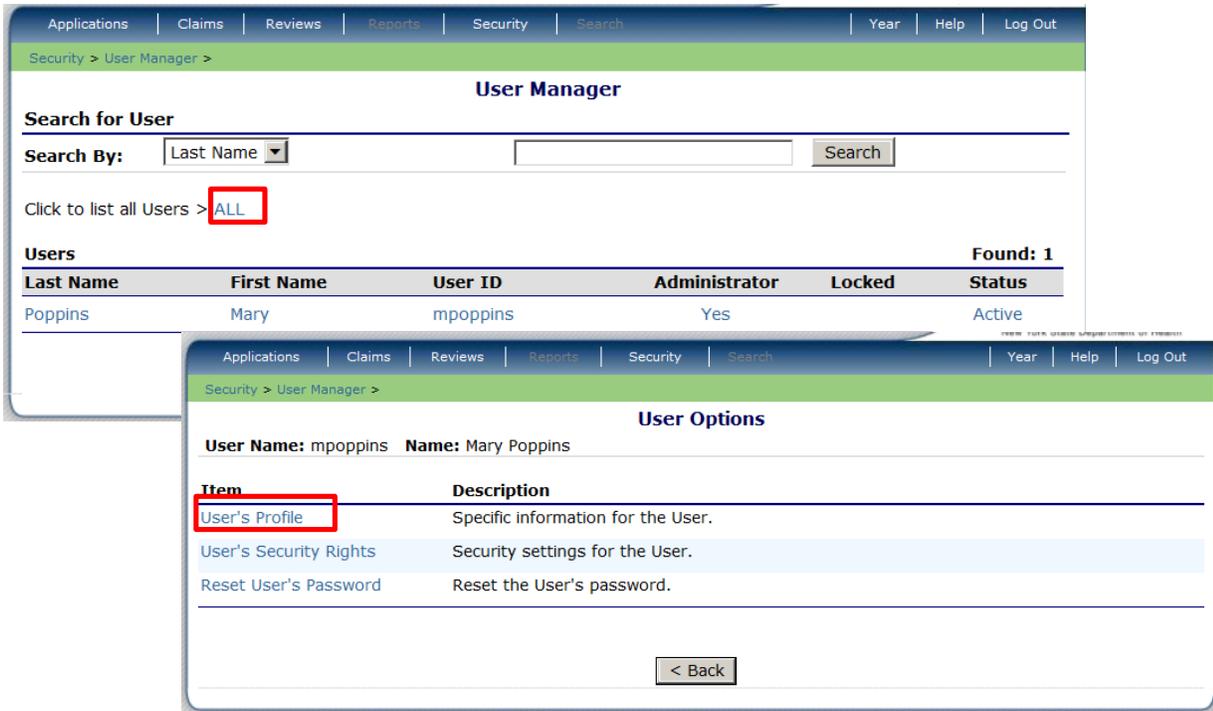
At the bottom right of the interface, there is a 'bottom' label.

6. Assign individual rights by clicking **ALLOW** or **DENY**.
7. Click **SAVE** at the bottom of the screen. The changes will not be retained if this step is skipped.
8. Log Out for changes to take effect.

## Inactivating Staff

**When a staff person leaves employment it is very important that their User Profile be switched to Inactive in CIPS.**

1. In the CIPS Dark Blue Menu Bar, click **SECURITY**
2. Then click **USER MANAGER**
3. Click **ALL** to view the list of current users.
  - It is possible to search for individuals by entering their name in the search box and clicking **SEARCH**.



The screenshot shows the CIPS User Manager interface. The top navigation bar includes 'Applications', 'Claims', 'Reviews', 'Reports', 'Security', and 'Search'. The breadcrumb trail is 'Security > User Manager >'. The main heading is 'User Manager'. Below this is a 'Search for User' section with a 'Search By:' dropdown set to 'Last Name', an empty search input field, and a 'Search' button. Below the search section, it says 'Click to list all Users >' with a red box around the 'ALL' link. Below that is a table of users with columns: Last Name, First Name, User ID, Administrator, Locked, and Status. The table shows one user: Poppins, Mary, mpoppins, Yes, Locked, and Active. Below the table is a 'User Options' section for the user 'mpoppins' (Name: Mary Poppins). It has a table with columns 'Item' and 'Description'. The 'User's Profile' item is highlighted with a red box. Other items include 'User's Security Rights' and 'Reset User's Password'. A '< Back' button is at the bottom.

4. Select the employee's name

5. Click **USER'S PROFILE**

Keep the User Profile up to date. Update the information as needed and it is recommended that Coordinators review all staff profiles annually. Follow steps 1-5, make changes and Save.

**User Profile**

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**User Information**

First Name:

Middle Initial:

Last Name:

Email Address:

Phone Number (555-555-5555):

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**Login Information**

User Name:

Password:

Confirm Password:

Require password change next login:

Single SignOn Name:

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**Security Base**

User is an Administrator:  Yes  No

Security Group(s):

- Sponsor Center App L1
- Sponsor Center Claim L1
- Sponsor Review L1
- Sponsor Admin Center

Associated to Sponsor(s):

- Learning CIPS, Inc.

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**Status**

User Status:

Created By: SMB05 on: 8/6/2013 12:08:51 PM Modified By: mpoppins on: 8/6/2013 12:08:51 PM

Click the arrow for a drop down menu and select **INACTIVE**.

6. Change User Status to **INACTIVE**

7. Click **SAVE**

8. **Alert HCS- call CAMU at 1-866-529-1890 to cancel the inactivated employee's account**

## When to Ask for Help...Troubleshooting Guide continued

<b>Question from caller:</b>	<b>Possible Resolution:</b>
Having trouble activating HCS account; HCS log in not working; HCS password not correct	Call HCS Commerce Account Management Unit (CAMU) Help Desk at 1-866-529-1890.
Payment has not been received	<p>It takes up to 2 weeks to receive payment once the claim is submitted. Payment is not received after 2 weeks, please contact the Financial Representative at CACFP.</p> <p><b><u>Check the status of the claim:</u></b></p> <ul style="list-style-type: none"> <li>• “Processed” – means payment is within 2 weeks.</li> <li>• “Accepted” - means the claim has been submitted.</li> <li>• “Pending” - means you have not submitted the claim.</li> <li>• “Error” - means there is a problem with the claim data.</li> </ul>
How to print a claim?	After clicking “Submit for Payment,” “Summary” will appear in the Action column on the left at the Claim Month Detail screen for the claim month. Open the Summary (not payment summary.) Use the print icon on the HCS screen. Use the “Show Center Site Details” at the bottom of the screen to show data for each center.
Claim says: "Pending"	Is there a red “Submit for Payment” button on the screen? If so, click it when the claim is complete. Once the status has changed to PROCESSED the claim check is usually mailed within 2 weeks.
One of the Centers is not eligible (and it should be).	Speak to the Nutritionist or Financial Representative.
Unable to enter all the meals/snacks.	Speak to the Nutritionist or Financial Representative.
Unable to access CIPS or the screen is frozen, or other web connectivity issues.	Please call our CACFP Help Desk for technical assistance. Call 1-800-942-3858. Please press “1” to be connected to a Help Desk agent.

<p>On screen errors</p>	<p>The system will indicate whatever is needed to complete. Follow the prompt message and supply whatever information is requested. If there are questions, contact the Nutritionist or Financial Representative.</p>
<p>Adding a new user; Inactivating a new user; Replacing the HCS Director; Replacing the HCS Coordinator</p>	<p>See Chapter 6- CIPS Security.</p>
<p>Changing security for a user</p>	<p>See Chapter 6- CIPS Security</p>
<p>How to revise information on the Sponsor or Center application?</p>	<p>For the Sponsor Application and Center Application click “Revise”. Once revisions are complete click “FINISH”, and then click “<b>SUBMIT FOR APPROVAL</b>”. Speak to the Nutritionist there are questions.</p>
<p>RENEWAL Questions</p>	<p>Speak to the Financial Representative or Nutritionist.</p>